Historic, archived document

Do not assume content reflects current scientific knowledge, policies, or practices.

TS-150 DECEMBER 1974

Reserve
1.9
Ec752F
TS

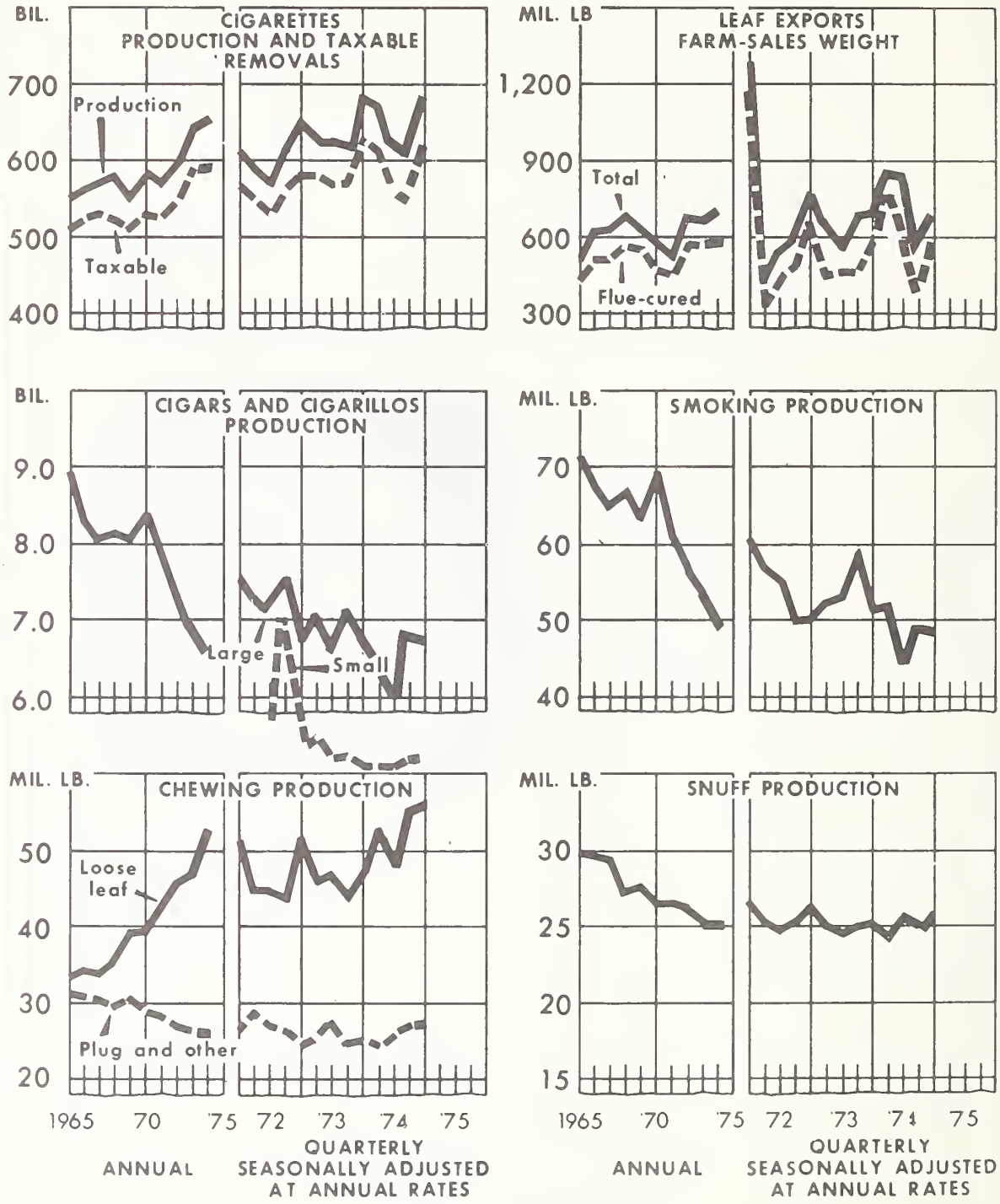
U.S. DEPT. OF AGRICULTURE
NAT'L AGRIC. LIBRARY
JAN 13 '75

TOBACCO Situation

ECONOMIC RESEARCH SERVICE • U.S. DEPARTMENT OF AGRICULTURE

TOBACCO OUTLETS

Trends in Manufactured Products and Exports



LAST QUARTER SHOWN ESTIMATED.

USDA

NEG. ERS 229-74 (12)

THE TOBACCO SITUATION

CONTENTS

	Page
Summary	3
150th Issue of USDA Tobacco Situation	4
Tobacco Products	4
U.S. Exports and Imports	7
Tobacco Leaf Situation and Outlook	11
International Developments	25
Recent Publications	27
Statistical Summary	29
List of Tables	31

• • •

Principal contributors:
Robert H. Miller
Richard Hall

Commodity Economics Division

Economic Research Service

U.S. Department of Agriculture
Washington, D.C. 20250

Approved by
The Outlook and Situation Board
and Summary released
December 13, 1974

• • •

The *Tobacco Situation* is published in March, June, September, and December.

SUMMARY

U.S. tobacco use in the current marketing year may about match the 2.1 billion pounds of last season, exceeding the 1974 crop of 2 billion. This will mean a further small reduction in carryover from the 2.95 billion pounds at the start of the 1974/75 marketing year.

U.S. growers' marketing quotas will total more next season so larger crops can be projected. If they are not realized, however, manufacturers and exporters will have to obtain alternative supplies in the years ahead.

Domestic tobacco supplies for 1974/75 are down 3 percent from last season because of reduced beginning stocks. The crop is up 13 percent from last year. Output of both flue-cured and burley rose less than expected because of unfavorable weather.

Record-high flue-cured prices continued in the second half of the marketing season and auction prices averaged 19 percent higher for the season. Burley auction markets opened in late November and prices rose to record high levels. With the burley crop below prospective use and loan stocks sold out, prices should hold firm throughout the marketing season.

The continuing rise in cigarette output means domestic tobacco use in 1974/75 likely will total a little above last marketing year's level. Despite higher U.S. tobacco prices and smaller supplies, U.S. exports of unmanufactured tobacco are expected to remain near last season's total.

Again in 1974, U.S. cigarette manufacturers have increased cigarette unit sales. Cigarette inventories have been reduced but output is rising about 1 percent above 1973. Further gains in adult population and in per capita use should boost cigarette output in 1975 to another record. In contrast, cigar volume trails 1973's output and the downtrend may continue in 1975.

Exports of U.S. unmanufactured tobacco gained during 1974. At approximately 650 million pounds (725 million pounds, farm-sales weight) exports will come close to setting a calendar year record. Increased utilization and lowered stocks in many foreign countries have resulted in generally tight supplies and rising prices in world markets.

Total leaf exports for the 1975 calendar year will easily surpass the 548 million-pound average for

1964-73, and may remain near the high level of this year. Continuing U.N. sanctions on trade with Rhodesia are helping U.S. exports. Japan's purchases of U.S. leaf picked up again this year. Despite rising excise taxes, U.S. leaf use in West Germany held steady. But U.K. cigarette manufacturers took less.

At 2.85 billion pounds, the flue-cured tobacco supply for the 1974/75 marketing year (July-June) is 3 percent below last year despite growers selling 7 percent more. The combination of a smaller carryover and strong buyer demand boosted grower price averages to a record-high $1.05 per pound. With use exceeding marketings, carryover in mid-1975 is expected to decline from the 1.6 billion pounds of a year earlier.

The 1975 national flue-cured marketing quota is up 15 percent from 1974. The effective quota (reflecting adjustments for the last season's marketings above and below quota) is about 1.6 billion pounds, 18 percent higher than last year. The average support level goes up about 12 percent next season. Some inputs for the 1975 tobacco crop will remain in short supply and production costs will increase further.

A sharp price rise on burley tobacco auctions brought sales through December 12 to a record average of $1.16 per pound, 22 cents above last year. About 85 percent of the crop will be sold in the pre-Christmas sales period.

Burley supply for 1974/75 is 1.64 billion pounds, about 3 percent below last season. Carryover on October 1 declined sharply due to the short crop last year. The 1974 burley crop is an estimated 572 million pounds, one-fourth above 1973's production.

Supplies of Maryland tobacco are about the same as last season, while supplies of several other kinds are lower. For fire-cured, dark air-cured, and cigar filler and binder, supplies are near the normal supply level, as defined in quota legislation. Thus, USDA may have to consider increasing or terminating quotas on those kinds for the 1975 crops. Marketing quotas and acreage allotments for tobacco under price support will be announced by February 1.

150TH ISSUE OF USDA TOBACCO SITUATION

This is the 150th issue of the *Tobacco Situation*. It provides current economic and statistical information for anyone interested in tobacco all the way from farm suppliers to tobacco distributors and tax officials.

Although tobacco outlook statements had been issued in the 1920's by USDA's Bureau of Agricultural Economics, the first regular report was published in January 1937. For the 1937 season the flue-cured crop averaged 23 cents per pound and burley sold for 20 cents. That year the retail price of cigarettes was 13 cents per pack and cigarette taxes averaged 6-2/3 cents. The Federal Government levied a 6 cents excise tax and State taxes applied in less than half the States. Factory wages averaged 62 cents per hour. It required 12½ minutes of work to earn the price of 1 pack of cigarettes compared with 6 minutes in 1974.

Tobacco Situation reports were issued only twice in 1943. Otherwise, the report has been issued 4 times a year. Appraisals of the prospective economic situation for tobacco are also published quarterly in the *Demand and Price Situation*, and from time to time in the *Farm Index* and *Agricultural Outlook Digest*. An analysis of the tobacco situation is presented at the annual USDA Outlook Conference, USDA meetings concerning tobacco quotas, and at the National Tobacco Advisory Committee. Basic statistical series are maintained and published annually in the *Agricultural Statistics* and in *Tobacco Statistics*.

TOBACCO PRODUCTS

More Cigarettes Smoked

Gains in population and in smoking per person are pulling U.S. cigarette consumption 3 percent above the 1973 level. Consumption totaled about 458 billion cigarettes during January-September 1974, 3 percent above a year earlier. Consumption gains continued in the third quarter, and seasonal sales patterns suggest further increases in the fourth quarter. Domestic consumption (taxable removals) takes about 90 percent of cigarette output (table 1). Yet despite the sagging economy indicated for next year, cigarette consumption and output may rise further.

The decline in real incomes has not appeared to affect cigarette sales. The consumer price index for all items is up 11 percent. With higher wholesale prices and

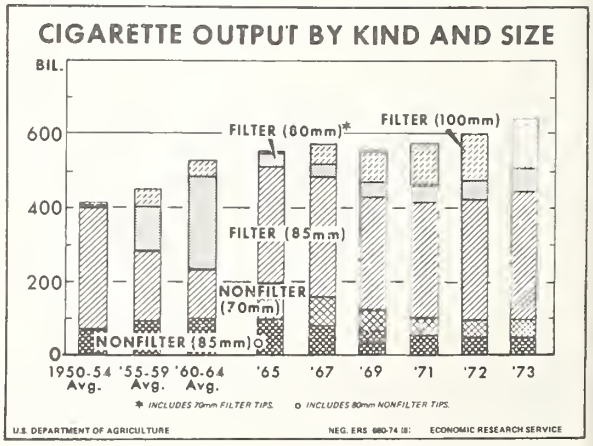


Table 1.--Cigarettes: Output, removals, and consumption, 1962-74

Year	Output	Removals					Total U.S. consumption 2/
		Taxable	Tax-exempt				
			Total	Exports	Puerto Rico and U.S. possessions	Overseas forces 1/	
	Billions						
1962	535.5	494.5	41.1	24.1	3.1	13.9	508.4
1963	550.6	509.6	41.1	23.6	3.2	14.3	523.9
1964	539.9	497.4	42.6	25.1	3.7	13.8	511.2
1965	556.8	511.5	44.2	23.1	3.9	17.2	528.7
1966	567.3	522.5	46.1	23.5	3.9	18.7	541.2
1967	576.2	527.8	49.0	23.7	3.9	21.4	549.2
1968	579.5	523.0	53.8	26.5	4.7	22.7	545.7
1969	557.6	510.5	47.1	25.0	3.7	18.4	528.9
1970	583.2	532.8	51.2	29.2	3.7	18.4	3/536.4
1971	576.4	528.9	49.2	31.8	2.7	14.7	3/550.0
1972	599.1	551.0	47.2	34.6	2.1	10.5	3/565.0
1973	644.2	590.3	55.9	41.5	2.0	12.4	3/591.2
1974 4/	650.0	588.0	62.0	48.0	2.0	12.0	3/610.0

1/ Also includes ship stores and small tax-exempt categories. 2/ Taxable removals plus overseas forces. 3/ Includes estimated inventory changes. 4/ Estimated.
Compiled from reports of the Bureau of Alcohol, Tobacco and Firearms, and the Bureau of the Census.

Table 2.--Cigars and smoking tobacco: Output, removals, and consumption, 1964-74

Year and item	United States factories			From Puerto Rico taxable	Imports	Exports	Total U.S. consumption 1/
	Output	Removals					
		Taxable	Tax-exempt				
	Millions						
Large cigars 2/							
1964	8,736	8,122	193	809	28	44	9,108
1965	7,899	7,578	180	913	25	55	8,641
1966	7,165	7,076	193	1,075	25	73	8,296
1967	6,858	6,846	197	1,099	30	76	8,096
1968	7,184	6,759	169	1,036	48	66	7,946
1969	6,931	6,739	169	1,080	45	65	7,968
1970	7,094	6,706	152	1,259	46	54	8,108
1971	6,707	6,506	131	1,222	48	46	7,861
1972	6,025	5,896	139	1,272	62	76	7,293
1973	5,655	5,553	143	1,304	75	108	6,967
1974 3/	5,200	5,100	145	1,300	70	90	6,525
	Million pounds						
Smoking tobacco							
1964	82.4	79.0	3.4	---	2.7	1.4	83.7
1965	71.8	67.3	3.0	---	2.1	1.0	71.4
1966	67.3	65.3	1.5	---	3.3	.9	69.2
1967	64.8	62.7	2.0	---	3.7	1.3	67.1
1968	66.3	64.1	1.9	---	5.5	1.8	69.7
1969	63.9	62.6	1.6	---	5.7	1.1	68.8
1970	69.4	65.6	1.5	---	8.4	.9	74.6
1971	60.5	61.3	1.4	---	8.4	1.2	69.9
1972	55.9	55.1	1.3	---	11.9	1.1	67.2
1973	53.0	51.7	1.5	---	8.2	1.3	60.1
1974 3/	49.0	49.0	1.0	---	11.0	1.3	59.7

1/ Total removals (or sales) from U.S. factories plus those from Puerto Rico, and imports, minus exports.
2/ Includes cigarillos. 3/ Estimated.
Compiled from reports of the Bureau of Alcohol, Tobacco and Firearms, Bureau of the Census. and Agricultural Marketing Services, USDA.

wider margins between wholesale and retail prices, cigarette prices have been averaging 5½ percent above a year ago. Only 2 States increased cigarette tax rates in 1974. This compares with rises for 2 States in 1973 and 16 States in 1972. By October, the weighted average State cigarette tax was 12.2 cents per pack, about the same as a year earlier.

U.S. cigarette exports to leading destinations, 1973-1974

Country	1973	January-October	
		1973	1974[1]
	Millions	*Millions*	*Millions*
Hong Kong	4,845	4,039	4,167
Belgium-Luxembourg	3,808	3,167	3,791
Spain	3,313	2,562	1,959
Lebanon	2,273	1,848	2,267
Saudi Arabia	1,945	1,574	1,690
Netherlands-Antilles	1,935	1,705	1,896
Kuwait	1,848	1,562	2,640
Japan	1,814	1,536	2,485
Panama	1,602	1,445	1,000
Ecuador	1,644	1,364	1,632
Mexico	1,292	1,097	1,125
Netherlands	1,003	408	408
Other countries	14,221	12,083	14,411
Total	41,543	34,390	39,471

[1] Subject to revision.

Compiled from publication and records of the Bureau of the Census.

In the last two years several States and cities have limited smoking in public places for health reasons. Similar legislation is pending elsewhere. The new smoking restrictions started to appear after the Surgeon General's Report of 1972 claimed dangers of passive smoking: The potential health hazard even to nonsmokers of cigarette, cigar, and pipe smoke in confined areas. Among the health-oriented smoking ordinances was the one effective November 1 in New York City that banned smoking in elevators and food stores.

Large-Cigar Volume Declines

Large Cigar consumption (including cigarillos) in the third quarter was 1 percent below a year earlier, after running 11 percent below in the first and second quarters. Still, the 1974 total will be down considerably (table 2). U.S. smokers (including those overseas) smoked 4.8 billion cigars and cigarillos in January-September, 8 percent fewer than a year earlier. Cigar shipments from Puerto Rico remained about the same but U.S. output was down 8 percent. This year's smaller sales are mostly in the lower price categories (cigars retailing for 8 cents each or less). Since 1964, the overall consumption trend has been downward; this pattern may continue in 1975 as younger smokers apparently show less preference for cigars than their elders.

Cigars: Taxable removals by revenue class, January-September 1974

Revenue class and retail price	Number	Change from 1973
	Billions	*Percent*
A-D (up to 8 cents)	2.56	-16.6
E (over 8 to 15 cents)	1.47	-8.2
F-G (over 15 cents)	.67	+52.5
Total removals	4.70	-8.0

For *small cigars* (cigarette-size, not over 3 pounds per 1,000) the 1974 taxable removals may decline one-fourth from 1973's record high. Small cigars sell for less per piece than cigarettes and large cigars. Manufacturers withdrew most radio and TV advertising

Tobacco products: Output 1972-74

Item	1972	1973[1]	1974[2]
	Million pounds	*Million pounds*	*Million pounds*
Chewing tobacco			
Plug	19.6	18.6	18.0
Twist	2.2	2.1	2.1
Fine cut	5.2	5.7	6.1
Loose leaf	45.6	47.6	52.8
Total	72.6	74.0	79.0
Snuff	25.5	25.3	25.0
Smoking tobacco in bulk (exports)	29.1	25.8	36.0
	Millions	*Millions*	*Millions*
Small cigars	4,022	4,415	3,250

[1] Subject to revision. [2] Estimated.

Basic data compiled from reports of Bureau of Alcohol, Tobacco and Firearms, and Agricultural Marketing Service, USDA.

for small cigars early in 1973 and then a U.S. law banned those ads later last year.

Sales of Smoking Tobacco Slip

Domestic use of *smoking tobacco*—including imports—totaled 44.5 million pounds through September, 1 percent below a year earlier. All domestic categories were down but imports rose. For all of 1974 smoking tobacco disappearance will show a similar percentage drop below 1973. Domestic output will do well to hold its own in 1975.

Chewing tobacco output and sales recorded a sizable gain in the third quarter. Loose leaf tobacco output accounted for most of the increase. Total production for 1974 may top last year's figure by 7 percent. The gain for loose leaf chewing tobacco is about 11 percent; however, plug tobacco is down 3 percent. *Snuff* sales declined again in the third quarter and production for all 1974 is estimated slightly below 1973.

U.S. bulk smoking tobacco exports to leading, destinations, 1973-74[1]

Country	Calendar year 1973	January-October 1973	January-October 1974
	Million pounds	*Million pounds*	*Million pounds*
Italy	1.0	1.0	[2]
Dominican Republic	1.3	1.2	1.4
Switzerland	2.1	2.0	12.1
Netherlands	9.7	8.0	1.0
Spain	1.8	1.1	2.4
Canary Islands	0	0	3.1
Ecuador	.8	.6	1.3
Finland	2.1	1.0	2.2
Australia	1.1	.9	1.6
Other countries	5.9	4.8	6.2
Total	25.8	20.6	31.3

[1] Subject to revision. [2] Less than 50,000 pounds.

Compiled from publications and records of the Bureau of the Census.

U.S. EXPORTS AND IMPORTS

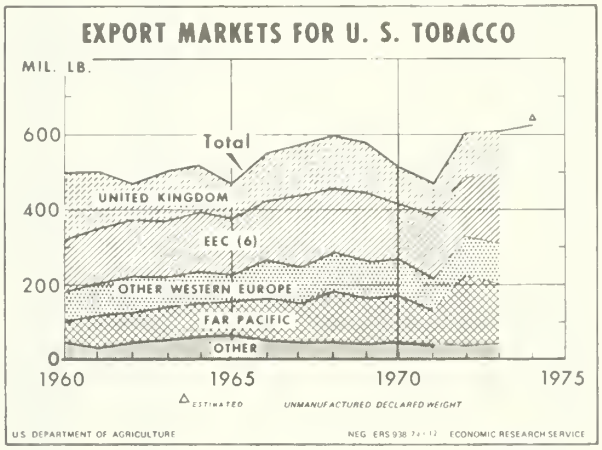
Calendar Year Leaf Exports to Increase

Exports of unmanufactured tobacco through October this year ran well above a year earlier (8 percent by weight, but up 20 percent by value). Poor crops and lowered stocks in many foreign countries boosted U.S. exports. The 1974 total will approach the record of 663 million pounds (731 million pounds, farm-sales weight) set in 1946. Exports in calendar year 1975 may remain near this year's level. Available U.S. supplies will remain tight until next season's crop is available for shipment. Effective with the 1973 crop the export payment program was terminated. Barter and CCC export credit also remain suspended. U.N. sanctions on Rhodesian trade continue to help U.S. producers. Production increases by some competing foreign producers this year apparently had a negligible impact on U.S. exports.

For January-October 1974, increases in exports were recorded for flue-cured—the principal export class—and most other types (tables 3 and 4). Among major markets, West Germany, Netherlands, Japan, Thailand, and Taiwan took more. In total, the 9-member European Community took slightly less U.S. tobacco. Smaller shipments went to the United Kingdom, Belgium-Luxembourg, and Denmark.

Imports Gain

Through October this year, U.S. tobacco imports for consumption (duty paid imports) rose 15 percent by weight above a year earlier. Cigarette leaf tobacco, the major import class is up reflecting cigarette production gains and short supplies of U.S. tobacco. Also, scrap



tobacco imports have risen sharply to supplement U.S. supplies in several categories. Use of imports in 1975 may increase further as cigarette and chewing tobacco output rises.

January-October 1974 general imports of tobacco (arrivals, i.e., direct entries plus that placed in bonded warehouses for later factory use) were about the same as the year-earlier level. For cigarette leaf, flue-cured and burley registered a sizable gain, while oriental leaf declined. Total cigar tobacco arrivals decreased as cost to importers rose sharply.

Imports increased more than rising tobacco use, so U.S. stocks of foreign-grown cigarette and smoking tobacco on October 1, 1974, totaled 493 million pounds (farm-sales weight). This was 14 percent above a year earlier, and a record high for that date.

Table 3.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

(Declared weight)

Country and type	Average 1966-70	1971	1972	1973 1/	January-October 1973 1/	January-October 1974 1/	1974 as a percentage of 1973 2/
	Million pounds						Percent
Flue-cured	418.3	341.1	425.3	418.3	321.1	340.3	106
Burley	45.4	36.7	53.7	59.3	49.8	57.0	115
Maryland	12.3	9.0	11.0	9.6	8.7	8.7	99
Fire- and sun-cured	25.0	22.5	25.6	21.4	16.0	21.2	133
Green River	.5	.4	.3	.1	.1	.2	141
One Sucker	.7	.6	.3	.3	.3	.7	144
Black Fat, etc.	2.8	2.5	3.3	3.1	2.3	2.3	100
Cigar wrapper	3.3	2.5	3.1	2.1	1.9	2.1	107
Cigar binder	1.4	.1	.1	.1	.1	.1	84
Cigar filler	.9	.3	.3	.3	.3	.6	120
Perique	.2	.1	.3	.2	.2	.1	52
Stems, trimmings, and scrap	51.0	57.0	82.9	98.1	73.0	77.0	105
Total	561.9	473.3	606.1	613.0	474.0	510.2	108
Country of destination							
United Kingdom	128.8	89.8	115.1	119.7	83.5	68.8	82
France	7.9	10.1	7.7	6.6	5.1	6.5	128
Belgium	17.0	15.6	12.9	16.7	15.0	12.9	86
Netherlands	34.7	28.1	22.4	31.6	25.2	27.5	109
West Germany	99.3	100.0	99.3	99.9	86.7	93.4	108
Denmark	18.1	16.7	20.8	3/37.0	3/31.3	10.6	34
Ireland	12.7	9.0	14.3	8.9	5.9	8.8	149
Switzerland	22.8	18.2	23.5	31.4	25.8	17.3	67
Finland	5.4	4.8	5.3	6.1	5.3	3.5	65
Norway	8.5	4.3	7.0	5.7	3.8	4.6	121
Sweden	18.5	14.7	20.5	17.1	13.7	12.8	93
Italy	7.7	16.4	23.1	21.8	21.8	22.5	103
Spain	4.3	5.2	4.6	4.3	4.3	6.3	146
Thailand	22.8	18.9	30.5	8.6	8.6	20.6	239
S. Vietnam	11.5	17.2	18.9	14.6	12.7	10.5	83
Malaysia	10.1	11.0	8.4	10.5	7.3	10.3	141
Philippine Republic	7.0	4.7	9.5	8.8	5.7	9.9	174
Taiwan	7.3	9.6	14.2	16.7	16.6	23.8	144
Japan	43.5	18.6	87.3	79.0	39.2	44.4	113
Australia	16.0	10.9	14.8	13.9	8.7	13.5	156
New Zealand	4.5	3.8	4.4	5.3	4.5	4.7	105
Egypt	3.4	1.2	.9	2.4	2.4	12.3	523
Other countries	50.1	44.5	40.8	46.4	41.9	64.7	154
Total	561.9	473.3	606.1	613.0	474.0	510.2	108

1/ Subject to revision.
2/ Computed from unrounded data.
3/ Shipments of 1973/74 purchases were bunched at the end of calendar year 1973.
Detail may not add to total due to rounding.

Compiled from publications and records of the Bureau of the Census.

Table 4.--United States exports of unmanufactured tobacco by types, to principal importing countries, crop years, 1971/72-1973/74 1/

(Declared weight)

Importing countries	1971-1972	1972-1973	1973-1974 2/
	Million pounds		
	Flue-cured, types 11-14		
United Kingdom	67.9	84.8	91.1
West Germany	73.2	69.9	75.8
Japan	45.0	52.4	61.7
Netherlands	12.8	11.8	17.0
Thailand	19.8	18.7	23.7
Australia	9.8	10.0	14.2
Italy	13.8	8.3	13.5
Sweden	8.0	6.7	8.1
Norway	3.0	3.2	4.3
Finland	3.2	3.4	2.9
Denmark	13.4	13.9	13.8
Ireland	7.7	7.7	6.8
Belgium	7.9	13.5	10.7
Switzerland	6.0	10.1	10.7
S. Vietnam	13.8	14.5	10.2
Philippine Republic	4.2	3.9	6.6
Spain	4.2	3.6	5.7
Malaysia	7.8	7.0	11.0
Taiwan	13.3	13.9	20.7
New Zealand	2.8	3.8	4.3
Other countries	29.1	31.1	36.1
Total	366.7	392.2	448.9
	Burley, type 31		
Italy	9.2	8.8	10.4
Sweden	2.0	2.6	3.8
Denmark	2.2	3.8	2.0
Netherlands	.6	2.6	2.9
Japan	3.3	4.2	6.3
West Germany	10.1	17.2	15.0
Switzerland	1.9	4.6	3.6
Finland	1.0	1.2	1.0
Thailand	3.8	1.6	2.9
Philippine Republic	3.6	2.6	6.3
Other countries	5.6	8.6	13.1
Total	43.3	57.8	67.3
	Maryland, type 32		
Belgium	1.0	1.7	.8
West Germany	1.8	2.3	2.4
Switzerland	4.2	6.3	4.4
Other countries	.7	1.3	1.8
Total	7.7	11.6	9.4
	Ky.-Tenn. fire-cured, types 22-23		
Sweden	.6	.5	.3
Netherlands	6.0	10.8	13.9
Belgium	.4	.8	.7
France	3.5	2.1	1.7
Switzerland	.9	.7	1.6
Other countries	4.2	4.1	3.2
Total	15.8	18.9	21.4
	Stems, Trimmings, and Scrap		
Sweden	5.6	6.5	4.4
Denmark	3.2	5.4	7.1
United Kingdom	15.8	22.5	23.6
West Germany	6.0	5.0	8.9
Japan	14.2	16.6	20.7
Other countries	24.2	29.3	36.8
Total	68.9	85.3	101.6

Importing countries	1971-1972	1972-1973	1973-1974 2/
	Thousand pounds		
	Va. fire and sun-cured, types 21, 37		
Sweden	449	307	333
Norway	1,683	1,893	1,149
West Germany	355	237	965
Other countries	509	1,043	3/3,535
Total	2,996	3,480	5,982
	One Sucker, type 35		
Belgium	0	112	218
Zaire (Congo, Kinshasa)	120	134	102
Other countries	97	136	4/381
Total	217	382	701
	Green River, type 36		
United Kingdom	80	117	108
Belgium	69	46	0
Zaire (Congo, Kinshasa)	40	44	74
Other countries	39	4	2
Total	228	211	184
	Cigar Filler, types 41-44		
France	280	233	300
New Zealand	55	30	304
Other countries	1	16	74
Total	336	279	678
	Conn. Binder, types 51-52		
West Germany	27	21	31
Canada	29	21	17
Canary Islands	0	28	3
Other countries	29	22	37
Total	85	92	89
	Wis. Binder, types 54-55		
Canary Islands	0	4	0
Other countries	1	1	2
Total	1	5	2
	Cigar Wrapper, types 61-62		
Canada	323	272	312
United Kingdom	1,195	1,155	549
West Germany	648	598	482
Netherlands	47	136	112
Canary Islands	115	183	159
Other countries	775	550	513
Total	3,103	2,894	2,127
	Black Fat		
Cameroon	550	390	483
Niger	84	128	326
Togo	499	405	240
Nigeria	253	211	192
Dahomey	1,353	1,877	1,292
Other countries	76	85	
Total	2,855	3,142	2,642

1/ July-June crop year for flue-cured, cigar wrapper, stems, trimmings, and scrap; October-September for all other types.
2/ Subject to revision. 3/ Includes 1,450,000 pounds to Poland and 719,000 pounds to Switzerland believed to be misclassified.
4/ Includes Cameroon 344,000 pounds. Detail may not add to total due to rounding.
Comiled from publications and records of the Bureau of the Census.

Table 5.--U.S. imports of unmanufactured tobacco for consumption and general, principal categories, and countries of origin, 1973 and January-October 1973-74 1/

(Declared weight)

Classification and country of origin	Imports for consumption				General imports (arrivals)			
	Total 1973	January-October			Total 1973	January-October		
		1973	1974	1974 as a percentage of 1973		1973	1974	1974 as a percentage of 1973
	Million pounds			Percent	Million pounds			Percent
Cigarette tobacco:								
Leaf, unstemmed								
Oriental								
Turkey	111.2	93.6	96.4	103	119.4	100.5	75.5	75
Greece	24.8	21.0	20.7	99	13.2	12.1	14.2	101
Yugoslavia	15.4	13.0	14.6	112	13.4	13.4	15.7	117
Lebanon	8.9	7.5	7.8	104	13.0	11.7	6.9	59
Other countries	3.7	3.3	3.3	100	17.9	16.0	22.9	143
Flue-cured and burley	6.1	4.4	16.1	365	38.7	33.3	40.1	120
Subtotal	170.1	142.8	158.9	111	215.6	187.0	175.3	94
Scrap								
Turkey	7.2	6.1	5.9	97	6.1	6.1	7.3	120
Other countries 2/	17.0	9.6	22.4	233	17.1	10.2	28.7	281
Total cigarette tobacco	194.3	158.5	181.2	118	238.8	203.3	211.3	104
Cigar tobacco:								
Wrapper	1.1	1.0	1.1	110	2.2	1.4	1.9	136
Filler-stemmed and unstemmed								
Dominican Republic	2.1	1.9	1.7	89	11.4	7.7	8.8	114
Other countries	8.8	7.5	7.2	96	38.8	36.0	26.6	74
Subtotal	10.9	9.4	8.9	95	50.2	43.7	35.4	81
Scrap								
Philippine Republic	14.5	11.9	23.1	194	14.0	11.3	14.0	124
Colombia	6.7	5.9	3.0	51	3.5	3.4	2.7	79
Dominican Republic	8.0	6.6	5.3	80	2.4	2.3	1.8	78
Brazil	10.5	9.4	7.7	82	6.3	4.8	2.7	56
Other countries	13.9	10.6	13.3	125	16.9	14.3	12.7	89
Subtotal	53.6	44.4	52.4	118	43.1	36.1	33.9	94
Total cigar tobacco	65.6	54.8	62.4	114	95.5	81.2	71.2	88
Stems	8.9	7.4	3.5	47	6.5	5.1	3.5	69
Grand total	268.8	220.7	253.1	115	340.8	289.6	286.0	99

1/ Preliminary.
2/ Canada, Mexico, Yugoslavia, Cyprus, Syria, Lebanon, India, Thailand, Korea, Angola, Mozambique, Zambia, Malawi.
Detail may not add to total due to rounding.

Compiled from publications and records of the Bureau of the Census.

1974 Crop Highlights

The 1974 tobacco crop is about 13 percent larger than last year. A larger gain was forecast earlier in the season, but unfavorable weather conditions limited crop output. Larger quotas were available for flue-cured and burley, and acreage of both crops increased. Flue-cured yields were below last year in Virginia and North Carolina. Burley prospects declined as the crop suffered from excessive rains and frost at harvest time. Average yield for all tobacco is 2,059 pounds per acre this season, compared with 1,965 pounds last season and the 1968-72 average of 2,027 pounds. Acres harvested totaled 957,310 or 7 percent above last year.

Increased crop size is offset by smaller carryover of most tobacco types. So reduced supplies are available for the 1974/75 marketing year. Prices for the current season will likely average 20 percent above 1973-74 and a record high. With the strong demand, volume of tobacco placed under loan this season is falling short of 1973's low level, and may total the smallest since World War II.

Farmers' cash receipts from tobacco in calendar 1974 are setting a record, one-third above the $1.57 billion in 1973. Volume is up, and flue-cured and burley tobaccos made large price gains. Look for larger sales volume next year, at slightly higher prices. Support levels will rise as required by law, grower costs will probably go up, and supplies are expected to remain short.

QUOTAS, ALLOTMENTS, AND PRICE SUPPORT

1975 Marketing Quotas and Allotments

The 1975 national quota for flue-cured tobacco is 15 percent larger. With the carryover of undermarketings, the effective quota is up 18 percent. For several years USDA has annually terminated quotas on cigar binder tobacco produced in the Connecticut Valley because supplies are below normal as defined in the quota legislation. Since supplies of fire-cured, dark air-cured, and cigar filler and binder are each near their normal supply level, USDA may have to consider increasing or terminating quotas on those kinds for the 1975 crop.

By February 1, USDA will announce the 1975 marketing quotas and acreage allotments for burley and several other kinds of tobacco. Shortly after the announcement, growers of binder and Ohio filler will vote in referendums for or against marketing quotas on their next 3 crops. If at least two-thirds of the voters approve, marketing quotas will be in effect. In previous referendums for flue-cured, burley, fire-cured, and dark air-cured types, farmers approved marketing quotas applicable to the 1975 crop.

1975 Price Support Levels

Price supports for eligible 1975 tobacco crops are expected to rise 12 percent above the 1974 price support level—some 68 percent above the 1959 base. As required by law, the 1975 price support adjustment will be based on the average of the parity index in 1972, 1973, and 1974 compared with 1959. USDA usually announces average support levels by tobacco types in the spring and individual grade loan rates just before the opening of the various marketing seasons.

[1] All quantities in this section are stated in farm-sales weight equivalent unless otherwise noted.

U.S. tobacco: Acreage and yield, 1972-74

Type	Acreage				Yield per acre			
	1972	1973	1974[1]	Change from 1973	1972	1973	1974[1]	Change from 1973
	1,000 acres	*1,000 acres*	*1,000 acres*	*Percent*	*Pounds*	*Pounds*	*Pounds*	*Percent*
Flue-cured								
11—Old and Middle Belt, VA.—N.C.	186.0	209.0	215.0	+3	1,749	1,891	1,850	-2
12—Eastern N.C.	157.0	180.0	186.0	+3	1,120	2,255	2,150	-5
13—S.C.—Border N.C.	103.0	114.0	129.0	+13	2,129	2,075	2,131	+3
14—Georgia—Florida	67.6	72.1	84.6	+17	1,997	1,651	2,218	+34
Total, types 11-14	513.6	575.1	614.6	+7	1,971	2,011	2,050	+2
Burley, type 31	235.6	222.3	255.5	+15	2,552	2,026	2,238	+10
Total, all types 11-72	842.4	886.8	957.3	+8	2,076	1,965	2,059	+5

[1] November 1 indications; burley is December 1.

Congress is considering legislation (H.R. 17506) that would raise tobacco price support levels to 90 percent of parity. The current formula for setting tobacco price supports was adopted in 1960. Before 1960, tobacco was supported at 90 percent of parity.

FLUE-CURED

With lower carryover more than offsetting a larger crop, the flue-cured supply for 1974/75 is 2 percent below last season. Utilization this marketing year probably will remain at last year's level, and exceed the 1974 crop. This means the carryover by next July would decline further. For next season's crop, the national poundage quota is up 15 percent. With this past season's undermarketings exceeding overmarketings, next season's effective quota will go up about 18 percent. This size crop, added to estimated carryover, would provide a supply next season about 7 percent larger (table 6).

1974 Auction Prices Record High

Prices for the 1974 flue-cured crop broke 1973's record. Sales volume was up, and crop value also set a record. Industry takings from both the current crop and loan holdings were heavy. Loan placements were a record low.

The 1974 flue-cured auction season lasted 18 weeks ending November 21. About nine-tenths of the crop had been sold by October 21. Prices increased almost steadily until mid-October and remained above the cumulative average until the last 2 weeks of sales. Price increases over last season were greatest for heavier bodied leaf and smoking tobacco. Some primings and nondescript declined. The season average price for gross sales (including resales) was $1.05 per pound—up 17 cents from last year's average. The average price rose in all belts; the rise ranged from 15 cents in type 14 to 18 cents in type 11 (table 7).

Producer marketings were the second highest of the 10 years under the acreage-poundage program. Sales totaled 1,240 million pounds—about 85 million more than in 1973. Crop quality showed some improvement over last year. There was a smaller proportion of fair and good grades than in 1973. Resales were above the 1973 season, averaging 4 percent of gross sales. With the grower designation program and graders and buyers

Table 6.—Flue-cured and burley tobacco: Marketing quota and marketings, 1965-75

Year	Quota		Marketings				Net Carryover[2]
	Basic	Effective	Actual	Over-quota	Under-quota	Effective under quota[1]	
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
			Flue-cured, types 11-14				
1965	1,126.0	1,124.4	1,055.5	27.1	96.0	96.0	68.8
1966	1,126.0	1,199.0	1,107.9	35.0	126.1	126.1	91.1
1967	1,126.0	1,202.4	1,247.5	77.9	32.8	30.8	-47.1
1968	1,126.5	1,067.9	996.3	26.5	98.1	96.6	70.0
1969	1,127.1	1,187.0	1,052.1	26.6	161.5	157.9	131.3
1970	1,071.0	1,190.8	1,178.2	65.1	77.6	71.2	6.1
1971	1,071.4	1,069.9	1,076.3	60.4	53.9	49.9	-10.5
1972	1,071.2	1,056.7	1,022.1	41.2	75.8	72.9	31.7
1973	1,178.4	1,205.6	1,158.5	54.8	102.0	98.5	43.7
1974	1,297.0	1,337.1	[3] 1,240.2				[3] 90.0
1975	1,492.0	[3] 1,582.0					
			Burley, type 31				
1971	555.1	552.9	471.5	9.7	91.2	91.1	81.4
1972	531.5	612.9	588.6	30.7	53.7	45.7	15.0
1973	559.7	573.6	461.4	11.1	123.2	112.4	101.8
1974	604.6	[4] 706.8					

[1] Under quota marketing less ineligible carryover. [2] Effective under quota marketings less over quota marketings. [3] Preliminary. [4] Subject to revision.

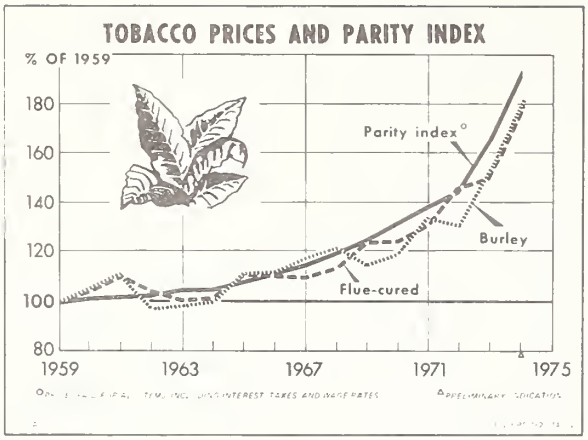
Compiled from records and reports of Tobacco and Peanut Division, ASCS.

Table 7.--Flue-cured tobacco: Gross sales (including resales) average price and loan receipts by Belt, 1967-74

Marketing season	Old Belt type 11 (a)	Middle Belt type 11 (b)	Eastern N.C. Belt type 12	N.C. Border and S.C. Belt type 13	Ga.-Fla. Belt type 14	All Belts
	Million pounds					
1967	260	152	359	322	224	1,317
1968	202	110	295	268	164	1,039
1969	235	116	321	266	157	1,096
1970	230	130	367	295	201	1,224
1971	217	117	323	268	182	1,107
1972	201	109	323	249	166	1,048
1973	249	124	385	270	153	1,181
1974 1/	383	2/	420	290	197	1,290
	Average price per pound					
	Cents					
1967	61.9	62.7	64.7	65.0	65.6	64.1
1968	64.8	64.0	67.5	66.8	68.3	66.5
1969	71.3	71.4	72.3	72.6	73.3	72.2
1970	70.1	70.0	72.7	71.7	74.3	71.9
1971	77.4	77.2	78.4	75.7	76.8	77.2
1972	82.3	84.8	87.2	85.3	85.4	85.3
1973	88.2	88.1	89.0	86.8	87.7	88.1
1974 1/	106.1	2/	105.9	103.9	102.8	105.0
	Receipts under Government loan					
	Million pounds					
1967	84.5	49.7	79.8	57.2	11.0	282.1
1968	36.0	26.9	24.3	29.5	12.0	128.8
1969	24.2	14.9	37.3	13.3	8.0	97.6
1970	29.7	19.8	43.3	28.8	22.7	144.2
1971	9.1	5.4	19.2	15.5	6.4	55.7
1972	11.4	3.1	8.2	1.1	.4	24.3
1973	7.4	4.3	17.0	3/2.4	.2	31.3
1974 1/	5.1	2/	8.1	7.5	2.4	23.1
	Percentage of net sales under Government loan					
	Percent					
1967	34.1	34.2	23.0	19.0	5.3	22.6
1968	18.8	25.3	8.5	11.5	7.8	12.9
1969	10.8	13.4	11.9	5.2	5.4	9.3
1970	13.4	15.8	12.1	10.2	11.9	12.2
1971	4.3	4.8	6.1	6.0	3.7	5.2
1972	6.0	3.0	2.6	.5	.3	2.4
1973	3.0	3.5	4.5	.7	.1	2.7
1974 1/	1.4	2/	2.0	2.7	1.3	1.9

1/ Preliminary. 2/ Included in Old Belt. 3/ Includes 0.5 million pounds direct deliveries at end of season.

Compiled from records and reports of Tobacco Division, Agricultural Marketing Service.



assigned according to those preferences, only 5 percent of the crop was sold outside of the belt where produced, compared to 12 percent the previous season.

Growers placed 2 percent of sales under loan this season, mostly primings, lugs, and nondescript grades in the first 2 weeks of auction season. Loan volume was the lowest since the program began after World War II. The Flue-cured Stabilization Cooperative, the association handling tobacco under loan, sold 76 million pounds during July 1-December 6, about the same level as for that period last year. Most Stabilization sales are for later delivery and will move into trade channels by mid-1975. Thus loan stocks at the beginning of 1975/76 may drop about one half below the 277 million pounds held last July 1.

Marketing Conditions Improve

Despite the larger crop and faster selling pace, flue-cured growers experienced the smoothest marketing in many a year. To obtain price support growers were required to designate a warehouse for the sale of their crop before mid-June and the USDA Flue-cured Tobacco Advisory Committee recommended opening dates and selling schedules to USDA. A buyer rotation plan was used and selling times were allocated according to the grower designations. Growers were able to change their warehouse designation at the beginning of each month, if they wished.

Almost all warehouses scheduled deliveries from growers; then buyers moved their tobacco off the floors rapidly without the tieups experienced in some areas last season. Manufacturers and exporters increased processing plant capacity so sales could average about 85 million pounds weekly compared with 75 million pounds last season.

Again this season the Stabilization Cooperative set up a separate pool for carryover tobacco in excess of the 110 percent of marketing quotas. About 0.4 million pounds came in under this storage arrangement. Growers lack facilities for extended farm-storage of tobacco and would be subject to heavy penalties if they sold this excess quantity.

Legislation was approved October 24 authorizing emergency lease and transfer of 1974 tobacco marketing quotas by growers in 2 countries of eastern North Carolina to other growers in the same or nearby counties.

Exports Remain Large

Flue-cured exports for July-October 1974 were below the peak level of a year earlier, but remained above the comparable period in 1966-70. Among the leading destinations, West Germany recorded an increase this year. Substantial shipments went to Egypt and Libya, as a result of changed economic and political situations in the Middle East. But this has not offset the decline recorded for several traditional buying countries, including the United Kingdom. By October, unit value has risen 18 percent above October 1973. UK cigarette manufacturers continue to expand other supply sources. Shipments to Japan usually go in mid-season, and their purchases may have risen a tenth or more. Except for favorable prospects in a few areas, reduced supplies are expected to limit exports to many destinations. By June total exports may fall 5 percent below last season's 598 million pounds.

U.S. flue-cured exports to principal countries, 1972-74 (export weight)

Country	July-October		
	1972	1973	1974
	Million pounds	*Million pounds*	*Million pounds*
United Kingdom	35	40	29
West Germany	27	26	30
Japan	6	5	2
Netherlands	4	6	5
Ireland	3	1	3
Thailand	11	6	0
Australia	3	3	2
Belgium	4	4	4
Denmark	4	10	6
Switzerland	3	5	2
Sweden	5	6	6
South Vietnam	2	1	0
Others	21	28	40
Total*	128	141	129

*Based on unrounded data.

Compiled from records and reports of the Bureau of the Census.

Supplies Declining Again in 1974/75

With lower carryover offsetting the larger current crop, the season's flue-cured supply of 2.85 billion pounds is about 2 percent below last year and one-fourth below the 1964/65 record (table 8). The 1974 crop was about 7 percent above 1973's outturn. Harvested acreage in 1974 increased 7 percent and the average yield per acre increased fractionally.

Table 8—.Flue-cured tobacco, types 11-14, and burley tobacco, type 31: Acreage, yield production, carryover, supply, disappearance, season average price, and price support operations, 1964-75

(Farm-sales weight)

Marketing year	Acreage harvested	Yield per acre	Production	Beginning stocks[1]			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	*Pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
	Flue-cured, types 11-14						
1964	627.6	2,211	1,387.8	1,689.5	696.9	2,386.4	3,774.2
1965	562.3	1,883	1,059.0	1,636.9	918.5	2,555.4	3,614.4
1966	607.0	1,825	1,107.9	1,602.5	836.4	2,438.9	3,546.8
1967	610.3	2,070	[2] 1,250.0	1,587.1	685.4	2,272.5	3,522.5
1968	533.0	1,841	[2] 995.6	1,528.1	773.4	2,301.5	3,297.1
1969	576.8	1,825	1,052.8	1,299.6	800.5	2,100.1	3,152.9
1970	584.1	2,042	[2] 1,178.1	1,227.5	744.9	1,972.4	3,150.5
1971	525.8	2,050	[2] 1,076.3	1,214.5	761.9	1,976.4	3,052.7
1972	513.6	1,971	[2] 1,022.1	1,292.4	617.8	1,910.2	2,932.3
1973	575.1	2,011	[2] 1,159.0	1,347.0	402.3	1,749.3	2,908.3
1974[3]	614.6	2,050	[2] 1,240.2	1,330.6	276.7	1,607.3	2,847.5
1975[4]				1,413.5	129.0	1,542.5	
	Burley, type 31						
1964	306.6	2,022	619.8	1,146.8	265.4	1,412.2	2,032.0
1965	277.1	2,116	586.3	1,099.3	316.4	1,415.7	2,002.0
1966	240.7	2,437	586.7	1,133.4	261.9	1,395.3	1,982.0
1967	237.7	2,274	540.6	1,104.8	276.7	1,381.5	1,922.1
1968	237.6	2,372	563.4	1,002.4	321.7	1,324.1	1,887.5
1969	237.7	2,488	591.4	975.7	340.8	1,316.5	1,907.9
1970	216.4	2,590	560.5	887.9	454.8	1,342.7	1,903.2
1971	213.5	2,213	472.6	882.4	468.4	1,345.8	1,818.4
1972	235.6	2,552	[2] 590.3	920.9	327.6	1,248.5	1,838.8
1973	222.3	2,026	[2] 461.4	952.5	276.7	1,229.2	1,690.6
1974[3]	255.5	2,238	563.3	931.5	139.2	1,070.7	1,642.5
1975[4]			571.8	1,003.5	4.0	1,007.5	

Marketing year	Disappearance			Average price per pound	Price support level	Placed under Government loan	
	Total	Domestic	Exports			Quantity	Percentage of crop
	Million pounds	*Million pounds*	*Million pounds*	*Cents*	*Cents*	*Million pounds*	*Percent*
	Flue-cured, types 11-14						
1964	1,218.8	774.7	444.1	58.5	57.2	285.6	20.7
1965	1,175.5	752.4	423.1	64.6	57.7	71.5	6.8
1966	1,274.3	687.2	587.1	66.9	58.8	74.6	6.8
1967	1,221.0	687.7	533.3	64.2	59.9	282.1	22.6
1968	1,197.0	671.7	525.3	66.6	61.6	128.8	12.9
1969	1,180.5	645.9	534.6	72.4	63.8	97.6	9.3
1970	1,174.1	640.1	534.0	72.0	66.6	144.2	12.2
1971	1,142.5	662.5	480.0	77.2	69.4	55.7	5.2
1972	1,183.0	664.2	518.8	85.3	72.7	24.3	2.4
1973	1,301.0	703.0	598.0	88.1	76.6	30.8	2.7
1974	[4] 1,305.0	[4] 725.0	[4] 580.0	[3] 105.0	83.3	23.1	1.8
	Burley, type 31						
1964	616.3	560.6	55.7	60.3	58.9	110.4	17.8
1965	606.7	549.6	57.1	67.0	59.5	42.2	7.2
1966	600.5	544.1	56.4	66.9	60.6	62.5	10.6
1967	598.0	544.6	53.4	71.8	61.8	64.2	11.9
1968	571.0	516.1	54.9	73.7	63.5	56.2	10.0
1969	565.2	507.1	58.1	69.6	65.8	158.2	26.8
1970	557.4	503.0	54.4	72.2	68.6	47.7	8.5
1971	569.9	515.2	54.7	80.9	71.5	.2	---
1972	609.6	534.5	75.1	79.2	74.9	22.9	3.9
1973	619.0	533.1	86.8	92.9	78.9	.7	.1
1974	[4] 635.0	[4] 545.0	[4] 90.0	[5] 116.0	85.8	[5] .0	---

[1] July for flue-cured; October 1, for burley. [2] Sales. [3] Subject to revision. [4] Estimated. [5] Through December 12.

The gain in U.S. cigarette output and the high level of exports in prospect for this marketing year means total disappearance may about equal last year's level. So, despite the larger crop, next July's carryover is expected to fall below last July's.

1975 Quota Up 15 Percent

USDA announced on November 27 the national flue-cured marketing quota for 1975 of 1,492 million pounds. The quota was increased 15 percent over 1974 to meet rising market demand. Earlier in the month USDA held 7 information meetings in the flue-cured production area and convened the National Tobacco Advisory Committee in Washington, D.C. Tobacco supply, utilization, and marketing developments were discussed at these meetings.

Acreage allotments and poundage quotas for individual farms will reflect 1974 undermarketings and overmarketings. Aggegrate marketings this past season were 7 percent below the effective quota. The average shortfall since the acreage-poundage program began in 1965 was 4 percent. The base quota plus estimated net undermarketings gives an effective 1975 quota of about 1,580 million pounds, or 18 percent above 1974. A crop close to the quota, when added to prospective carryover, would provide a 1975/76 supply about 7 percent above this year's level.

Tobacco loan stocks, 1972-74

(Farm-sales weight)

Type	End of November		
	1972	1973	1974
	Million pounds	*Million pounds*	*Million pounds*
Flue-cured, 11-14	531.0	364.5	270.0
Uncommitted	372.7	261.1	95.8
Burley, 31	316.6	273.9	128.7
Uncommitted	259.9	101.0	0
Virginia, 21	(2)	(2)	0
Kentucky-Tennessee, 22-23	.8	3.3	1.0
Kentucky-Tennessee, 35-36	13.1	13.1	4.9
Ohio, 42-44	0	0	0
Puerto Rican, 46	0	0	1.4
Connecticut Valley, 51-52	2.0	2.1	2.0
Wisconsin, 54-55	0	0	0
Total	863.5	656.0	408.0

[1] October 31. [2] Negligible.

Compiled from records of Tobacco and Peanut Division, ASCS.

BURLEY

Auction Prices Record High Again

Auction sales of the 1974 burley crop began November 25 and will close December 19 for the Christmas holidays. Sales resume on January 6. Gross sales totaled about 525 million pounds and averaged a record high $1.16 per pound during the first 3 weeks of sales. Opening sales were heavy in volume as many growers had stripped a portion of their crop by November 1. Quality of the crop is lower. Growers will sell about 85 percent of the crop in the pre-Christmas sales, compared to 76 percent last season.

Prices opened 22 cents per pound above last year's opening and increased further in succeeding sales. Quality is off slightly from last year as sales contain larger percentages of lower grades and tips. Better grades are selling 24 cents per pound above support levels and about 17 cents above last year. Some leaf and tip grades are 25 cents higher than last year.

Grade loans rates range from 65 to 90 cents a pound, with an average support level of 85.8 cents. USDA increased grade loan rates from 5 to 11 cents per pound over 1973 levels. Through December 12, the 2 burley cooperatives took negligible amounts under government loan. Little had been taken under loan last year, too.

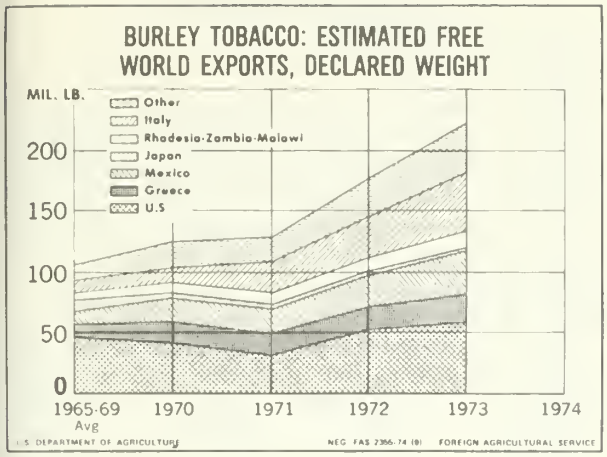
1973/74 Disappearance Record High

During the year ended September 30, 1974, burley disappearance totaled 619 million pounds. This was about 2 percent above the previous year and slightly above 1964/65, the previous record use. Exports climbed to a record high level while domestic burley use remained about the same. By comparison, a gain of 3 percent occurred for U.S. cigarette manufacture, the principal outlet for burley. During the same period, smoking tobacco output fell 6 percent to 50 million pounds, a record low. Despite a downtrend in burley tobacco use per cigarette, increased cigarette production in 1974/75 would point to a gain in domestic burley disappearance.

Burley exports for the crop year ended September 30, 1974, were above last year, with volume totaling 87 million pounds. Most destinations took more. The Philippines recorded most of the increase. West Germany continued as our leading foreign burley market. At the end of 1973, West Germany's stocks of all tobaccos were off about 5 percent. American burley tobacco declined slightly, accounting for about 30 percent of West Germany's burley imports in 1973. But sales of American brand cigarettes to West Germany increased.

Supplies Lower

This season's burley supply of 1,634 million pounds is about 3 percent below last season and 20 percent below the 1964/65 peak (table 8). The 1974 crop, estimated December 1 at 572 million pounds, was 27 percent above last year's crop. This reflects increases in both acreage and yields due to better weather conditions during the growing season. Still, conditions from start to finish were far from ideal. Effective farm poundage quotas totaled 707 million pounds—133 million above



last year's quota. Harvested acreage gained 15 percent from last year and estimated yield gained a tenth.

Burley carryover on October 1 was down 13 percent from a year earlier due to the short crop in 1973. Carryover under government loan was down more than half to 139 million pounds. By early December, the loan cooperatives sold all remaining stocks. With a negligible loan take again this season, only a token loan carryover is anticipated next marketing year.

Supply for 1974/75 is equal to 2.55 times probable disappearance, substantially lower than last season. Based on legislative formula, the desirable ratio is about 2.75 Thus the supply shortfall is over 100 million pounds, so another carryover decline is expected by next October 1.

Outlook for burley in 1975 hinges partially on the quota decisions USDA will make by February 1. Burley poundage legislation requires that the national quota for any year not be less than 95 percent of estimated marketing year disappearance. For 1974/75 the basic allotment was set at 608 million pounds. By contrast, disappearance in 1973/74 totaled 619 million pounds, 2 percent above the previous year. A gain is indicated for 1974/75. If this pattern continues, USDA will probably raise the burley quota for the 1975 crop. As in the past, individual farm quotas are adjusted for the previous year's overmarketings and undermarketings. Another sizeable carryover of undermarketings is indicated.

MARYLAND

1973/74 Disappearance Edges Up

During the year ended September 30, 1974, disappearance of Maryland tobacco was 26 million pounds. This was 2 percent above the previous year, which was the lowest level since the early 1930's (table 9). The 1974 crop output may have fallen below 1973. Acreage and yield are indicated lower.

Domestic use of Maryland tobacco at 13.7 million pounds was 0.3 million above last year but 24½ million below 1968's level. Supplies are picking up but manufacturers must adequately age the larger 1973 crop before it can be used in cigarette blends. Domestic use in the current marketing year may gain a little from that in the past year.

Last season's exports totaled 12 million pounds—about the same as the previous year. Switzerland's takings were down after the previous season's gain. Switzerland accounted for about one-half of exports.

Supplies Higher

Carryover on January 1, 1975, is estimated to rise one-fourth above the 44 million pounds of a year earlier. The 1974 Maryland tobacco crop in Southern Maryland is estimated at 29 million pounds, slightly below the previous season. Some additional Maryland tobacco is grown in flue-cured and burley areas. Acreage allotments were not in effect, since growers have regularly disapproved marketing quotas. Estimated supply (current crop plus estimated carryover) for 1974/75 is

Table 9.—Maryland tobacco, type 32: Acreage, yield, production, carryover, supply, disappearance, season average price, 1968-74

Marketing year	Acreage harvested	Yield per acre	Supply			Disappearance[1]			Average price per pound to growers
			Production	Stocks, Jan. 1	Total	Total	Domestic	Exports	
	Thousand acres	*Pounds*	*Pounds*	*Pounds*	*Pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Cents*
1968	29.0	1,100	31.9	81.5	113.4	48.7	38.3	10.4	69.8
1969	26.5	1,060	28.1	66.7	94.8	41.3	29.1	12.2	75.1
1970	27.0	1,090	29.4	50.1	79.5	39.5	27.6	11.9	78.6
1971	27.0	1,040	28.1	46.0	74.1	25.5	17.5	8.0	81.9
1972	24.0	990	23.8	46.6	70.4	25.5	13.4	12.1	84.5
1973[2]	27.7	1,260	35.0	43.8	78.8	26.0	13.7	12.3	87.8
1974[3]	27.0	1,185	32.0	54.0	86.0				

[1] Year beginning October 1. [2] Includes sales and certification data from production in quota areas. [3] Estimated.

about a tenth above a year earlier. Auction sales of the 1974 Maryland tobacco crop will begin April 15 and end June 12 of 1975.

FIRE-CURED

Auction Prices Rise

Auction markets for Virginia fire-cured tobacco (type 21) opened December 3. For sales through December 12 prices averaged 87 cents pound, 12 cents above last year's level. Quality declined some from last year's crop. Markets closed for the holidays on December 19 and reopen in January. Auctions for Kentucky-Tennessee fire-cured (types 22 and 23) are expected to open around the middle of January. At an estimated 37 million pounds, the 1974 fire-cured crop is 10 percent above 1973. Acreage and yield gains are recorded for both Virginia and the Kentucky-Tennessee types. In the Virginia fire-cured markets before Christmas, prices substantially exceeded support so again there were no loan placements.

Supplies Trending Down

Despite a larger crop, the reduced carryover brings the 1974/75 supply of fire-cured types to 89 million pounds—almost 9 million below a year earlier. All the drop is in the Kentucky-Tennessee types as Virginia fire-cured supplies stabilized the past 2 years. Based on last season's use, this supply would last less than 2 years. On October 1, the beginning of the marketing year, government loan stocks were only 1 million pounds, the lowest in many years. Total carryover next October will probably decrease slightly (table 10).

Disappearance Increases

Disappearance of fire-cured types in 1973/74 was 46 million pounds—about 4 million pounds more than in the previous season. Both domestic use and exports gained. Snuff output declined 2 percent but plug and twist chewing tobacco gained 2 percent. Domestic use of Kentucky-Tennessee types increased about 2 million pounds after the previous season's drop. Domestic use of Virginia fire-cured remained near the low level of the previous year.

Exports of fire-cured tobacco, including an allowance for Black Fat, increased 2.3 million pounds last season. Exports of Kentucky-Tennessee types to the Netherlands increased again. In that country, our major fire-cured destination, cigar and smoking tobacco manufacture is a major part of the tobacco industry. For Black Fat, a semiprocessed product made of flue-cured and dark air-cured leaf, exports decreased about 0.5 million pounds. Exports of Virginia fire-cured for 1973/74 remained about the same. But Norway, the major destination, decreased its takings.

DARK AIR-CURED

Auction Prices Jump

Auction markets for Green River and One Sucker tobaccos opened December 3 and December 6, respectively (Kentucky-Tennessee dark air-cured, types 35-36). Auctions for Virginia sun-cured (type 37) opened December 10. Farmers received considerably more for each type than last season, and well above the support level of 51.8 cents per pound. The quality of offerings was not as good.

At an estimated 13½ million pounds, the dark air-cured crop is about the same size as 1973's production, but 8 million below last season's disappearance. Acreage was down slightly for each type.

Supplies Below Year Ago

The supply of dark air-cured and sun-cured tobacco for 1974/75, about 53½ million pounds, is 9 million below last season. Supply is lower for each type but most of the drop is in One Sucker and Green River due to reduced carryover (table 11). Total supplies of dark air-cured tobacco represent about 2½ years' use, based on last year's disappearance. Government loan stocks on October 1 (the outset of the current marketing year) fell sharply from the year-earlier holdings. Carryover will again decline as the disappearance rate substantially exceeds current production.

Disappearance Increases

Disappearance of dark air-cured tobacco last season was 20 million pounds, 4 million more than in the previous season. Both domestic use and exports gained. The combined output of plug, twist, and fine-cut chewing tobacco gained 2 percent. For exports last season One Sucker increased sharply due to a larger shipment to Cameroon. Green River and Black Fat declined.

CIGAR TOBACCO

U.S. and Puerto Rican Supplies Lower

Supplies of U.S. and Puerto Rican cigar tobacco are about 5 percent lower than in 1973, continuing the postwar trend (table 12). October 1 carryover is down 9 percent but 1974/75 production is estimated higher. About half of the decline in supply is occurring in cigar binder types, but filler and wrapper supplies are also down some. Last season, disappearance of filler and wrapper was lower than in 1972/73. Binder disappearance gained one-fifth from the previous season's low level. On November 30, government loan

Table 10.—Fire-cured tobacco, Kentucky-Tennessee types 22-23, and Virginia fire-cured type 21: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-74

(Farm-sales weight)

Marketing year beginning October 1	Average harvested	Yield per acre	Production	Beginning stocks, October 1 -- Manufacturers and other	Beginning stocks, October 1 -- Under loan	Beginning stocks, October 1 -- Total	Total supply
	Thousand acres	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
	Kentucky-Tennessee fire-cured, types 22-23						
1967	17.3	1,702	29.5	64.0	27.3	91.3	120.8
1968	17.9	1,822	32.6	57.3	21.5	78.8	111.4
1969	19.0	1,797	34.1	61.1	11.6	72.7	106.8
1970	17.7	1,749	30.9	54.1	9.7	63.8	94.7
1971	19.5	1,928	37.6	48.6	4.7	53.3	90.9
1972	20.4	1,844	37.6	55.0	1.2	56.2	93.8
1973	16.6	1,668	27.7	54.2	3.1	57.3	85.0
1974 1/	17.4	1,770	30.8	44.0	1.1	45.1	75.9
	Virginia fire-cured, type 21						
1967	5.4	1,290	7.0	12.1	2.7	14.8	21.8
1968	4.9	1,205	5.9	8.9	2.8	11.7	17.6
1969	5.0	1,340	6.7	8.0	1.9	9.9	16.6
1970	5.0	1,230	6.2	8.4	1.4	9.8	16.0
1971	5.0	1,180	5.9	8.0	1.0	9.0	14.9
1972	4.8	970	4.7	7.9	.4	8.3	13.0
1973	4.7	1,220	5.7	7.6	3/	7.6	13.3
1974 1/	5.0	1,250	6.2	7.1	---	7.1	13.3

Marketing year beginning October 1	Disappearance: Total	Disappearance: Domestic	Disappearance: Exports	Average price per pound	Price support level	Placed under Government loan: Quantity	Placed under Government loan: Percentage of crop
	Million pounds			Cents		Million pounds	Percent
	Kentucky-Tennessee fire-cured, types 22-23						
1967	42.0	14.9	27.1	46.2	41.9	.8	2.7
1968	38.7	2/19.1	19.6	51.1	43.1	.4	1.2
1969	43.0	18.5	24.5	48.1	44.6	1.9	5.6
1970	41.4	13.1	28.3	54.4	46.6	3/	.1
1971	34.7	16.0	18.7	60.8	48.5	3/	.1
1972	36.5	14.2	22.3	57.3	50.8	2.8	7.4
1973	39.9	15.7	24.2	71.7	53.5	.2	.7
1974					58.2		
	Virginia fire-cured, type 21						
1967	10.1	3.4	6.7	40.9	41.9	.7	10.1
1968	7.7	3.0	4.7	46.9	43.1	.2	3.4
1969	6.8	1.7	5.1	53.1	44.6	.1	1.5
1970	7.0	2.4	4.6	52.0	46.6	.1	2.0
1971	6.6	3.1	3.5	54.8	48.5	.1	1.0
1972	5.4	1.3	4.1	64.2	50.8	3/	.1
1973	6.2	1.7	4.5	75.5	53.5	3/	---
1974				4/84.5	58.2	3/4/	4/.7

1/ November 1 crop prospects. 2/ Includes 4.7 million pounds fire loss, April 1969. 3/ Less than 50,000 pounds. 4/ Through December 18.

Table 11.—Dark air-cured tobacco, types 35-36, and Sun-cured tobacco type 37: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-74

(Farm-sales weight)

Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks: Manufacturers and other	Beginning stocks: Under loan	Beginning stocks: Total	Total supply
	Thousand acres	Pounds	Million pounds				
	Dark air-cured, types 35-36						
1967	9.5	1,629	15.5	39.2	21.3	60.5	76.0
1968	9.8	1,831	18.0	41.1	17.1	58.2	76.2
1969	10.1	1,793	18.1	44.1	15.0	59.1	77.2
1970	8.2	1,863	15.4	35.5	18.2	53.7	69.1
1971	8.6	1,834	15.7	35.5	14.3	49.8	65.5
1972	8.2	1,875	15.5	33.5	12.7	46.2	61.7
1973	7.6	1,647	12.4	31.9	12.8	44.7	57.1
1974 1/	7.2	1,770	12.7	31.4	5.5	36.9	49.6
	Sun-cured, type 37						
1967	1.2	1,090	1.3	4.2	0	4.2	5.5
1968	1.1	1,095	1.2	3.9	0	3.9	5.1
1969	1.1	1,225	1.3	3.8	0	3.8	5.1
1970	1.0	1,100	1.1	3.3	0	3.3	4.4
1971	.9	1,200	1.1	3.1	0	3.1	4.2
1972	.8	1,010	.8	3.0	0	3.0	3.8
1973	.7	1,320	.9	3.2	0	3.2	4.1
1974 1/	.7	1,300	.9	3.0	0	3.0	3.9

	Disappearance: Total	Disappearance: Domestic	Disappearance: Exports	Average price per pound	Price support level	Placed under Government loan: Quantity	Placed under Government loan: Percentage of crop
	Million pounds			Cents		Million pounds	Percent
	Dark air-cured, types 35-36						
1967	17.8	14.8	3.0	40.8	37.3	1.4	9.0
1968	17.1	15.0	2.1	47.4	38.3	.7	3.9
1969	23.5	21.2	2.3	40.3	39.7	4.8	26.5
1970	19.3	16.7	2.6	46.0	41.4	1.0	6.8
1971	19.3	17.4	1.9	47.1	43.1	1.7	10.7
1972	17.0	14.7	2.3	50.3	45.2	1.2	.8
1973	20.2	17.4	2.8	61.9	47.6	#	.2
1974				2/79.1	51.8	2/#	2/.8
	Sun-cured, type 37						
1967	1.6	1.2	.4	45.2	37.3	3/25	1.9
1968	1.3	1.1	.2	53.2	38.3	3/1	.1
1969	1.8	1.5	.3	52.8	39.7	3/1	.1
1970	1.3	1.1	.2	53.8	41.4	3/3	.3
1971	1.2	1.0	.2	54.1	43.1	0	---
1972	.6	.4	.2	57.9	45.2	0	---
1973	1.1	.9	.2	69.2	47.6	0	---
1974				2/82.3	51.8	2/3/1	.1

1/ November 1 crop prospects. 2/ Through December 18. 3/ Quantity placed under Government loan reported in thousand pounds. # Less than 50,000 pounds.

stocks of cigar tobacco were about the same as 1973's total.

Production of U.S. cigar types was estimated at about 4 percent above 1973. Acreage was down, but yields increased. U.S. cigar leaf tobacco is sold either directly on the farms or through cooperatives. Therefore, price data are less detailed than for types sold at auctions. Buyers are probably paying more per pound for Connecticut binder crops than last season but purchasing has not begun for other types. Season average prices will be published in the May 1975 issue of USDA's crop report.

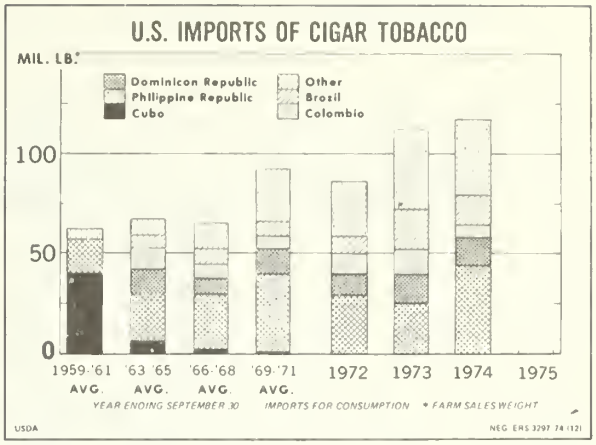
Filler Supplies Decline

Supplies of continental cigar filler (U.S. and Puerto Rican) are 3 percent below 1973 to a new record low level. Production was up 9 percent but carryover was down by the same percentage. These supplies would last about 2½ years, based on 1973/74 disappearance. Disappearance in the 1974/75 marketing year may remain near last season's level but probably will again exceed production. Filler acreage may have stabilized; yields for the 1974 crop are up.

Imports Supplementing Lower U.S. Supplies

Again last season, cigar tobacco imports substantially exceeded use from domestic filler supplies. Imports accounted for about six-tenths of U.S. cigar tobacco requirements. With domestic supplies declining further in 1974/75, manufacturers will again draw heavily on foreign leaf.

Despite reduced cigar production, manufacturers increased imports in 1973/74 (October-September). Last season 131 million pounds of cigar tobacco were imported for consumption, 18 million pounds more than in the previous season. Imports from the Philippines and Mexico increased substantially but imports from Brazil were down. Imports from several other suppliers increased. Foreign-grown cigar leaf stocks in the United States on October 1 were 126 million pounds—about 11 million above a year earlier.



Binder Supplies Fall

Binder tobacco supplies for the season are 7 percent below 1973/74 due to lower carryovers and crops. Yields are steady but acreage is down. Some crops were hurt by frosts last September. In Wisconsin, the State Department of Agriculture has recommended no further action on a proposed marketing order for type 54 tobacco. Grower support was lacking. All buying companies in Wisconsin have agreed to a voluntary licensing program (Wisconsin Tobacco Buying and Selling Code).

Cigar binder disappearance last season was 25 million pounds, almost 4 million above a year earlier. Disappearance increased for both Wisconsin and Connecticut Valley binder. Loose leaf chewing tobacco output, the principal outlet for Wisconsin binder, gained 5½ million pounds. Loose leaf manufacturers continue to use other kinds of leaf to supplement Wisconsin leaf. At current levels of use, Connecticut tobacco is used primarily for natural binder in higher-priced cigars.

Foreign-grown cigar leaf tobacco: U.S. imports and stocks, 1971-74

Country of origin	Imports for consumption				Dealers and manufacturers stocks			
	Year ending September 30—				October 1—			
	1971	1972	1973	1974	1971	1972	1973	1974
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
Philippines	46.7	29.1	25.1	44.4	39.9	37.7	33.2	41.0
Dominican Republic	13.3	11.4	15.3	14.2	10.8	10.4	16.6	19.8
Brazil	6.5	3.2	21.0	14.5	9.5	7.2	8.8	8.8
Colombia	7.4	10.0	11.7	7.1	8.2	10.6	13.4	13.8
Paraguay	2.8	4.5	8.0	5.4	6.7	4.3	7.3	8.1
Mexico	5.0	6.7	6.5	7.9	6.3	6.7	6.4	5.6
Indonesia	4.2	2.5	6.4	8.7	4.2	4.6	10.2	9.4
All others	21.7	19.1	19.0	28.9	12.7	13.6	19.5	19.6
Total	107.6	86.5	113.0	131.1	98.3	95.2	115.3	126.1

Table 12.--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-74

(Farm-sales weight)

Crop year	Acreage harvested	Yield per acre	Supply: Production	Supply: Beginning stocks 1/	Supply: Total supply	Disappearance: Total	Disappearance: Domestic	Disappearance: Exports	Average price per pound to growers
	Thous. acres	Pounds	Million pounds						Cents
			Pennsylvania Seedleaf Filler (type 41)						
1967	21.0	1,825	38.3	112.3	150.6	41.9	41.3	0.6	28.0
1968	21.0	1,775	37.3	108.7	146.0	40.9	40.0	.9	30.0
1969	20.0	1,825	36.5	105.1	127.9	44.3	43.7	.6	30.0
1970	17.0	1,800	30.6	97.3	129.3	40.9	40.7	.2	31.0
1971	15.2	1,610	24.5	87.0	111.5	41.3	40.6	.4	36.0
1972	13.0	1,400	18.2	70.2	88.4	34.7	34.4	.3	46.0
1973	13.0	1,700	22.1	53.7	75.8	28.3	27.5	.8	52.0
1974 2/	13.0	1,900	24.7	47.5	72.2				
			Ohio, Miami Valley Filler (types 42-44)						
1967	2.3	1,580	3.6	15.5	19.1	6.2	6.2	---	29.0
1968	2.0	1,670	3.4	12.9	16.3	5.4	5.4	---	31.0
1969	1.7	1,650	2.8	10.9	13.7	4.7	4.7	---	32.5
1970	1.6	1,750	2.9	9.0	11.9	4.1	4.1	---	38.0
1971	2.0	1,850	3.8	7.8	11.6	4.6	4.6	---	41.0
1972	2.4	1,780	4.2	7.0	11.2	4.4	4.4	---	44.0
1973	2.2	1,650	3.6	6.8	10.4	4.5	4.5	---	51.0
1974 2/	2.1	1,600	3.4	5.9	9.3				
			Puerto Rico Filler (type 46) 3/						
1967	7.6	1,419	10.8	40.5	51.3	16.9	16.9	---	4/33.1
1968	6.0	1,282	7.6	34.4	42.0	16.2	16.2	---	4/33.3
1969	4.7	1,303	6.1	25.8	31.9	12.6	12.6	---	4/33.6
1970	3.2	1,397	4.5	19.3	23.8	8.8	8.8	---	4/36.1
1971	4.8	1,418	6.7	15.0	21.7	9.0	9.0	---	4/39.8
1972	5.6	833	4.8	12.7	17.5	8.3	8.3	---	4/42.1
1973	4.5	1,435	6.5	9.2	15.7	5.7	5.7	---	4/41.2
1974 2/	3/2.8	1,600	3/4.5	10.0	14.5				
			Total Cigar Filler (types 41-46)						
1967	30.9	1,707	52.7	168.3	221.0	65.0	64.4	.6	29.1
1968	29.0	1,666	48.3	156.0	204.3	62.5	61.6	.9	30.5
1969	26.4	1,721	45.4	141.8	187.2	61.6	61.0	.6	30.6
1970	21.8	1,737	38.0	125.6	163.6	53.8	53.6	.2	32.1
1971	22.0	1,587	35.0	109.8	144.8	54.9	54.5	.4	37.3
1972	21.0	1,293	27.2	89.9	117.1	47.4	47.1	.3	45.0
1973	19.7	1,633	32.2	69.7	101.9	38.5	37.7	.8	49.7
1974 2/	17.9	1,820	32.6	63.4	96.0				
			Connecticut Valley Binder (types 51-52)						
1967	1.5	1,819	2.7	16.4	19.1	7.9	5.7	2.2	54.5
1968	1.6	1,808	2.8	11.2	14.0	5.1	4.7	.4	59.5
1969	1.6	1,434	2.3	8.9	11.2	4.2	3.9	.3	58.2
1970	1.7	1,756	2.9	7.0	9.9	2.7	2.4	.3	65.5
1971	1.6	1,743	2.8	7.2	10.0	2.6	2.5	.1	65.7
1972	1.6	1,600	2.5	7.4	9.9	2.4	2.3	.1	70.1
1973	1.6	1,721	2.7	7.5	10.2	3.2	3.1	.1	72.8
1974 2/	1.4	1,740	2.5	7.0	9.5				
			Southern Wisconsin Binder						
1967	3.8	1,905	7.2	20.7	27.9	8.0	8.0	---	34.4
1968	3.7	1,990	7.4	19.9	27.3	7.7	7.7	---	36.8
1969	3.7	1,740	6.4	19.6	26.0	9.3	9.3	---	40.2
1970	4.4	2,135	9.4	16.7	26.1	7.3	7.3	---	50.3
1971	5.3	2,270	12.0	18.8	30.8	10.5	10.5	---	55.6
1972	5.0	1,685	8.4	20.3	28.7	9.3	9.3	---	48.0
1973	4.9	1,950	9.6	19.4	29.0	10.1	10.1	---	60.5
1974 2/	4.7	1,925	9.0	18.9	27.9				
			Northern Wisconsin Binder (type 55)						
1967	4.5	1,975	8.9	29.3	38.2	9.3	8.9	.4	34.1
1968	4.0	1,670	6.7	28.9	35.6	14.9	14.5	.4	37.9
1969	3.7	1,815	6.7	20.7	27.4	8.8	8.5	.3	43.4
1970	4.4	2,055	9.0	18.6	27.6	9.2	9.1	.1	52.0
1971	5.3	1,980	10.5	18.4	28.9	9.9	9.9	#	54.0
1972	5.8	1,770	10.3	19.0	29.3	9.8	9.8	#	49.0
1973	5.3	1,775	9.4	19.5	28.9	12.0	12.0	#	60.7
1974 2/	4.7	1,825	8.6	16.9	25.5				

See footnotes at end of table.

Continued --

Table 12.--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-74--Cont.

(Farm-sales weight)

Crop year	Acreage harvested	Yield per acre	Supply: Production	Supply: Beginning stocks 1/	Supply: Total supply	Disappearance: Total	Disappearance: Domestic	Disappearance: Exports	Average price per pound to growers
	Thous. acres	Pounds	Million pounds						Cents
	Total Wisconsin Binder (types 54-55)								
1967	8.3	1,943	16.1	50.0	66.1	17.3	16.9	0.4	34.2
1968	7.7	1,824	14.1	48.8	62.9	22.6	22.2	.4	37.3
1969	7.4	1,778	13.1	40.3	53.4	18.1	17.8	.3	41.8
1970	8.8	2,095	18.4	35.3	53.7	16.5	16.4	.1	51.1
1971	10.6	2,125	22.5	37.2	59.7	20.4	20.4	#	54.9
1972	10.8	1,731	18.7	39.3	58.0	19.1	19.1	#	48.5
1973	10.2	1,859	19.0	38.9	57.9	22.2	22.2	#	60.6
1974 2/	9.4	1,875	17.6	35.8	53.4				
	Total Cigar Binder (types 51-55)								
1967	9.8	1,924	18.8	66.4	85.2	25.2	22.6	2.6	37.1
1968	9.3	1,821	16.9	60.0	76.9	27.7	26.9	.8	41.0
1969	9.0	1,716	15.4	49.2	64.6	22.3	21.7	.6	44.3
1970	10.5	2,041	21.3	42.3	63.6	19.2	18.8	.4	53.1
1971	12.2	2,075	25.3	44.4	69.7	23.0	22.9	.1	56.1
1972	12.4	1,714	21.2	46.7	67.9	21.5	21.4	.1	51.1
1973	11.8	1,841	21.7	46.4	68.1	25.4	25.3	.1	62.1
1974 2/	10.8	1,857	20.1	42.8	62.9				
	Connecticut Valley Shade-grown (type 61)								
1967	8.5	1,124	9.6	16.0	25.6	12.9	9.6	3.3	360.0
1968	8.4	1,215	10.2	12.7	22.9	10.8	9.1	1.7	280.0
1969	6.3	1,288	8.1	12.1	20.2	8.0	7.0	1.0	400.0
1970	6.0	1,535	9.3	12.2	21.5	7.6	6.6	1.0	400.0
1971	4.7	1,635	7.7	13.9	21.6	8.4	5.7	2.7	400.0
1972	4.0	1,250	5.1	13.2	18.5	7.6	4.8	2.8	485.0
1973	5.0	1,210	6.0	10.7	16.7	8.2	6.3	1.9	515.0
1974 2/	5.0	1,637	8.2	8.5	16.7				
	Georgia-Florida Shade-grown (type 62)								
1967	5.1	1,573	8.0	8.7	16.7	7.9	6.3	1.6	245.0
1968	5.0	1,556	7.9	8.8	16.7	9.2	7.1	2.1	270.0
1969	5.0	1,569	7.8	7.5	15.3	6.1	5.2	.9	280.0
1970	3.6	1,590	5.6	9.2	14.8	6.7	5.8	.9	270.0
1971	3.0	1,582	4.7	8.1	12.8	6.2	5.4	.8	262.0
1972	3.0	1,517	4.6	6.6	11.2	4.2	3.8	.4	280.0
1973	2.6	1,413	3.7	7.0	10.7	4.2	3.7	.5	350.0
1974 2/	1.9	1,725	3.2	6.5	9.7				
	Total Shade-grown (types 61-62)								
1967	13.6	1,292	17.6	24.7	42.3	20.8	15.9	4.9	308.0
1968	13.4	1,343	18.1	21.5	39.6	20.0	16.2	3.8	276.0
1969	11.3	1,411	15.9	19.6	35.5	14.1	12.2	1.9	341.3
1970	9.6	1,555	14.9	21.4	36.3	14.3	12.4	1.9	351.0
1971	7.7	1,614	12.4	22.0	34.4	14.6	11.1	3.5	347.5
1972	7.0	1,365	9.7	19.8	29.5	11.8	8.6	3.2	387.0
1973	7.6	1,280	9.7	17.7	27.4	12.4	10.0	2.4	452.0
1974 2/	6.9	1,661	11.4	15.0	26.4				
	Grand Total Cigar Tobacco (types 41-62)								
1967	54.3	1,642	89.1	259.4	348.5	111.0	102.9	8.1	85.7
1968	51.7	1,610	83.3	237.5	320.8	110.2	104.7	5.5	85.9
1969	46.7	1,645	76.7	210.6	287.3	98.0	94.9	3.1	97.7
1970	41.9	1,771	74.2	189.3	263.4	87.3	84.8	2.5	102.3
1971	41.9	1,734	72.7	176.2	248.9	92.5	88.5	4.0	96.7
1972	40.4	1,434	58.1	156.4	214.5	80.7	77.1	3.6	104.4
1973	39.1	1,627	63.6	133.8	197.4	76.3	73.0	3.3	115.7
1974 2/	35.6	1,800	64.1	121.2	185.3				

1/ October 1 for types 41-55; July 1 for types 61-62.

2/ Based on November 1 crop prospects and estimated stocks.

3/ Puerto Rican planting occurs late in calendar year; projected for 1974.

4/ Excludes payment by Puerto Rican Government; 20 cents per pound in 1973.

Less than 50,000 pounds.

Table 13.--Tobacco: Acreage, yield, production, stocks, supply, disappearance, price and crop value, United States and Puerto Rico, 1947-74

(Farm-sales weight)

Crop year	Acreage	Yield per acre	Production	Stocks 1/	Supply	Disappearance 1/			Average price per pound to growers	Crop value
						Total	Domestic	Exports		
	1,000 acres	Pounds	Million pounds						Cents	Million dollars
	United States									
Average:										
1947-49	1,676	1,208	2,019	2,947	4,965	1,908	1,417	491	45.9	926
1950-54	1,690	1,292	2,184	3,382	5,566	2,006	1,479	527	51.2	1,118
1955-59	1,242	1,541	1,914	4,095	6,009	1,951	1,397	554	56.0	1,072
1960-64	1,159	1,879	2,178	3,911	6,089	2,037	1,468	569	60.0	1,307
1965	977	1,898	1,855	4,496	6,351	2,000	1,462	538	65.1	1,207
1966	972	1,939	1,885	4,351	6,236	2,098	1,392	704	66.5	1,252
1967	960	2,050	1,968	4,140	6,108	2,020	1,372	648	66.8	1,316
1968	879	1,945	1,710	2/4,088	5,798	1,975	1,352	623	69.5	1,189
1969	918	1,964	1,803	3,823	5,626	1,949	1,308	640	71.8	1,296
1970	898	2,122	1,906	3,678	5,584	1,919	1,278	639	72.9	1,389
1971	839	2,034	1,705	2/3,667	5,372	1,883	1,312	571	78.6	1,340
1972	842	2,076	1,749	2/3,488	5,237	1,951	1,312	639	83.0	1,451
1973 3/	889	1,963	1,746	2/3,289	5,035	2,085	1,353	732	90.0	1,572
1974 4/	960	2,056	1,973	2/2,950	4,923				108.1	2,132
	United States and Puerto Rico									
Average:										
1947-49	1,710	1,200	2,045	3,012	5,057	1,942	1,447	495	45.6	932
1950-54	1,728	1,282	2,215	3,430	5,645	2,036	1,508	527	50.9	1,127
1955-59	1,270	1,528	1,941	4,147	6,088	1,981	1,426	555	55.6	1,080
1960-64	1,188	1,861	2,211	3,957	6,168	2,066	1,497	569	59.7	1,319
1965	994	1,882	1,871	4,559	6,430	2,027	1,489	538	64.8	1,212
1966	981	1,934	1,899	4,403	6,300	2,121	1,415	704	66.2	1,256
1967	967	2,045	1,979	4,181	6,160	2,037	1,390	648	66.7	1,319
1968	885	1,941	1,718	2/4,122	5,840	1,992	1,368	623	69.3	1,191
1969	923	1,960	1,810	3,849	5,658	1,961	1,320	640	71.7	1,298
1970	902	2,120	1,912	3,698	5,609	1,928	1,288	639	72.9	1,391
1971	844	2,031	1,714	2/3,682	5,394	1,893	1,321	571	78.4	1,342
1972	848	2,068	1,759	2/3,501	5,256	1,959	1,320	639	82.9	1,453
1973 3/	894	1,960	1,753	2/3,298	5,051	2,091	1,359	732	89.8	1,575
1974 4/	963	2,054	1,978	2/2,960	4,938				108.0	2,135

1/ For flue-cured and cigar wrapper, year beginning July 1; for all other types, October 1. 2/ Includes flue-cured carried over on farms; 1968, 13 million pounds; 1971, 16 million pounds; 1972, 17 million pounds; 1973, 7 million pounds for flue-cured and 13 million pounds for burley, 1974, 5 million pounds for flue-cured. 3/ Subject to revision. 4/ Preliminary.

Disappearance may remain about the same this year resulting in another decline in stocks.

Wrapper Supplies Decline

Cigar wrapper tobacco supplies for 1974/75 are about 4 percent below last year. Connecticut Valley wrapper supplies steadied, but Georgia-Florida again declined. Total carryover was down about 15 percent from last year. If disappearance steadies, carryover next July 1 will drop slightly below last July's 15 million pounds.

During July-October 1974, exports for cigar wrapper were above the level of a year earlier. Exports were up for Connecticut Valley wrapper but down for Georgia-Florida. United Kingdom manufacturers again took a sizable quantity of Connecticut Valley wrapper this season to supply their expanding cigar market.

INTERNATIONAL DEVELOPMENTS

World Tobacco Harvest Up Slightly[2]

World tobacco production in 1974 of about 11 billion pounds is up 7 percent from 1973. Production increased in North America, South America, Asia, Africa, and Oceania, but declined in Europe and the USSR.

Flue-cured production was 9 percent above last year. A gain is indicated for Peoples Republic of China (PRC), the largest producing country. Output also gained in the United States, Canada, Brazil, India, Philippines, and Rhodesia. Japan's production declined. In most other areas, production remained about unchanged from the year before, but substantially above the 1965-69 average. Rhodesia's trade is held down by U.N. sanctions (table 14).

In Rhodesia, the 1974 flue-cured harvest increased but still fell below production goal of 200 million pounds. The goal for 1975 remains at 200 million pounds. U.N. sanctions on Rhodesian trade continue, and unstable political conditions in that country and surrounding areas tend to limit the expansion of Rhodesia's tobacco crops.

Production in Canada gained this season, as growers had larger quota and a little better growing conditions. In Ontario, the chief production area, auctions began October 25. Prices for the first 6 weeks' sales averaged

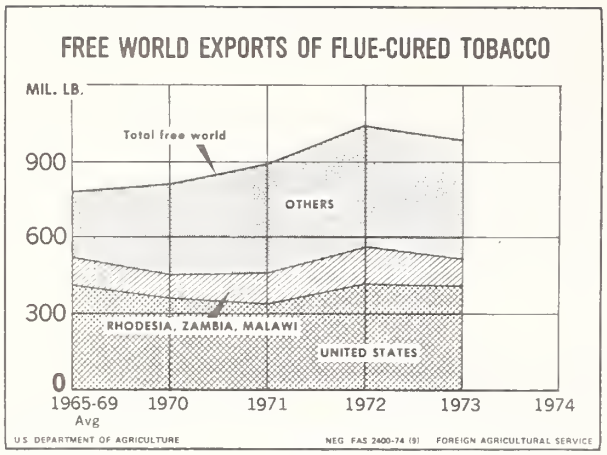
[2] Data summarized from "World Production of Tobacco," Foreign Agriculture Circular FT 6-74, December 1974, available from Foreign Agriculture Service, Room 5918, USDA, Washington, D.C. 20250.

Table 14.—Flue-cured and Oriental tobacco production in specified countries, average 1965-69, 1972-74

Country	Average 1965-69	1973[1]	1974[2]	Country	Average 1965-69	1973[1]	1974[2]
	Million pounds	*Million pounds*	*Million pounds*		*Million pounds*	*Million pounds*	*Million pounds*
Flue-cured:				Flue-cured—			
Canada	208	251	258	continued:			
Mexico	12	12	10	Cambodia	10	4	4
Brazil	144	156	238	South Korea	106	172	166
Angola	9	9	11	Pakistan	60	[3]39	[3]50
Mozambique	5	5	4	Philippines	76	56	66
Zambia	13	14	14	Thailand	37	46	65
Malawi	4	22	23	South Vietnam	5	6	6
Rhodesia	187	130	165				
Tanzania	11	28	26	Total	1,500	1,520	1,643
Uganda	4	7	7				
South Africa	34	38	35	Oriental:			
Iran	10	7	7	Greece	204	171	156
Taiwan	39	35	35	Bulgaria	242	[4]279	[4]279
Ceylon	7	11	11	Yugoslavia	94	110	100
India	212	238	220	Turkey	345	333	386
Indonesia	35	30	30				
Japan	272	204	192	Total	885	893	921

[1] Subject to revision. [2] Preliminary. [3] West Pakistan only. [4] Estimated.

Compiled from reports of Foreign Agricultural Service.



94 U.S. cents per pound compared with 75 cents a year earlier. For the entire crop, buyers have assured growers an average of 83 cents per pound.

Burley production in 1974 was up 15 percent from 1973 and was 32 percent above the 1965-69 average. The larger U.S. crop accounted for most of the gain. In Italy, the largest producer after us, output stabilized. Output was lower in South Korea.

Oriental leaf production was virtually unchanged in 1974, but remains 10 percent above the 1965-69 average. Russia's output increased. In Greece and Turkey, old crop stocks are negligible and 1973 prices soared. Growers are again expecting a strong market for their crops. U.S. firms have begun to purchase oriental leaf in Italy where the buyers' premium makes the price attractive.

Table 15.—United Kingdom tobacco: Imports, stocks, clearances, and exports, 1972-74

Item	January-September			Item	January-September		
	1972	1973	1974[1]		1972	1973	1974[1]
	Million pounds	*Million pounds*	*Million pounds*		*Million pounds*	*Million pounds*	*Million pounds*
Imports, by source:				Gross clearances:			
United States	61	57	48	Full duty rate[2]	108	116	110
Commonwealth	105	112	121	Commonwealth rate[3]	118	120	126
Other	34	49	61				
Total	200	218	230	Total	225	236	236
Exports:				Flue-cured:			
Manufactured products	43	43	45	United States	83	87	74
				Canada	48	43	48
				India	32	34	35
Unmanufactured	6	6	4	Zambia and Malawi	11	15	17
				Rhodesia	([4])	([4])	([4])
Stocks, Sept. 30:				Other	26	49	58
Flue-cured	317	277	353				
Other	57	68	22	Total	200	228	232
Total	374	345	375	Net clearances:	172	187	([5])

[1] Estimated. [2] Equivalent to $13.67 per pound. [3] Equivalent to $13.556 per pound. [4] Negligible. [5] Not available.

Compiled from official United Kingdom sources.

RECENT PUBLICATIONS

A Summary of Tariff and Nontariff Barriers On Tobacco in Free World Markets, 1973. FAS M 257, June 1974.[2] Over 2.3 billion pounds of tobacco were traded in 1972, or 24 percent of estimated world production. Import duties and nontariff barriers significantly influence international tobacco trade. This publication updates similar separate publications in 1969 and 1970.

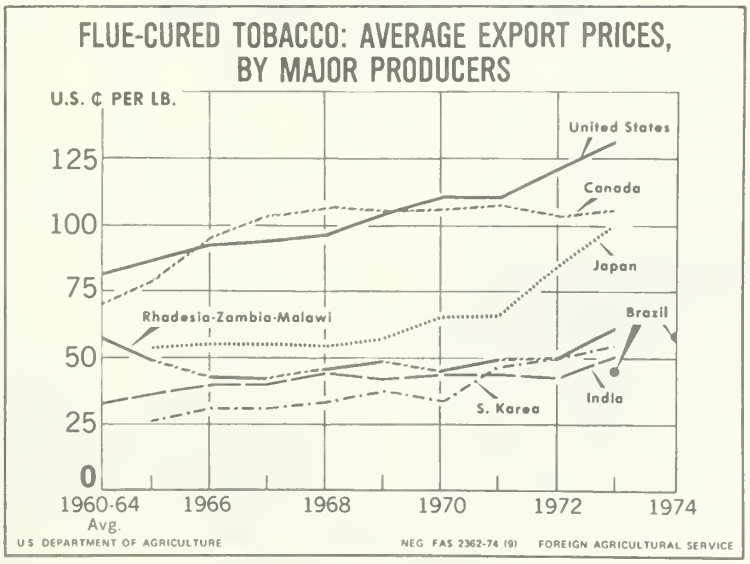
Dynamics of the U.S. Tobacco Economy, Technical Bulletin No. 1499, Jitendar S. Mann, July 1974.[1] A 14-equation recursive model is used to develop multipliers used to illustrate the effects of (1) a 6.5 cent-per-pound increase in the support rate for flue-cured tobacco, (2) a 30-million-pound increase in the quota for burley, and (3) a 1-cent-per-pack increase in Federal and State cigarette taxes.

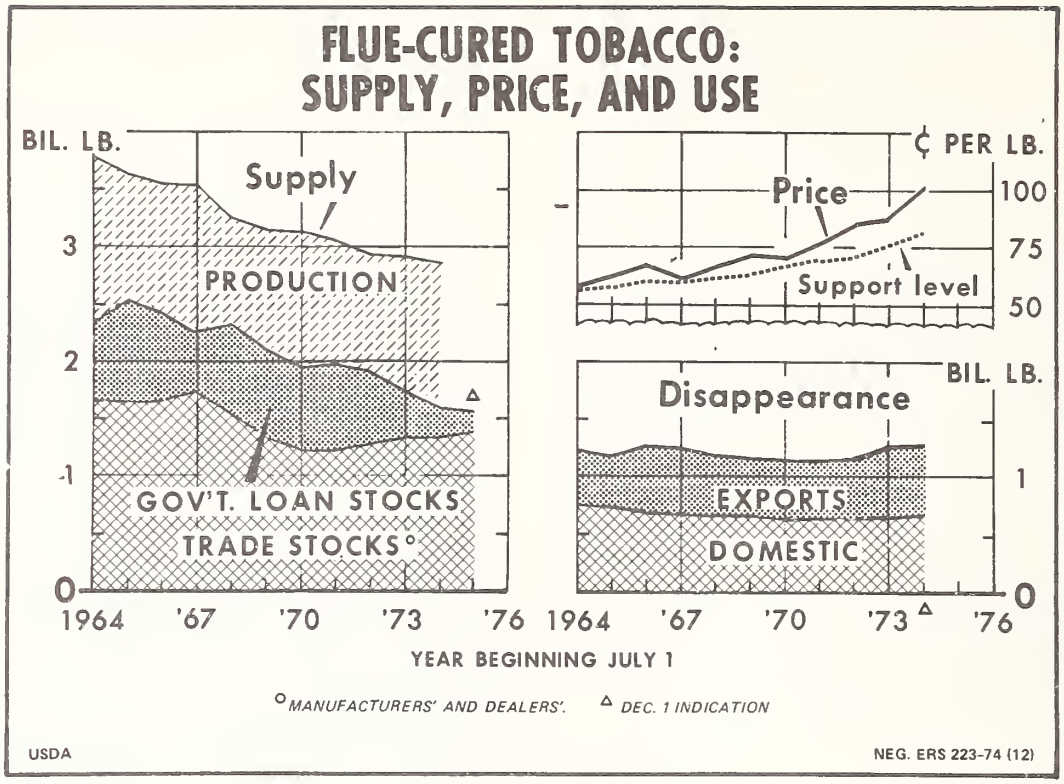
[1] Available from ERS Publications, Room 0054, USDA, Washington, D.C.

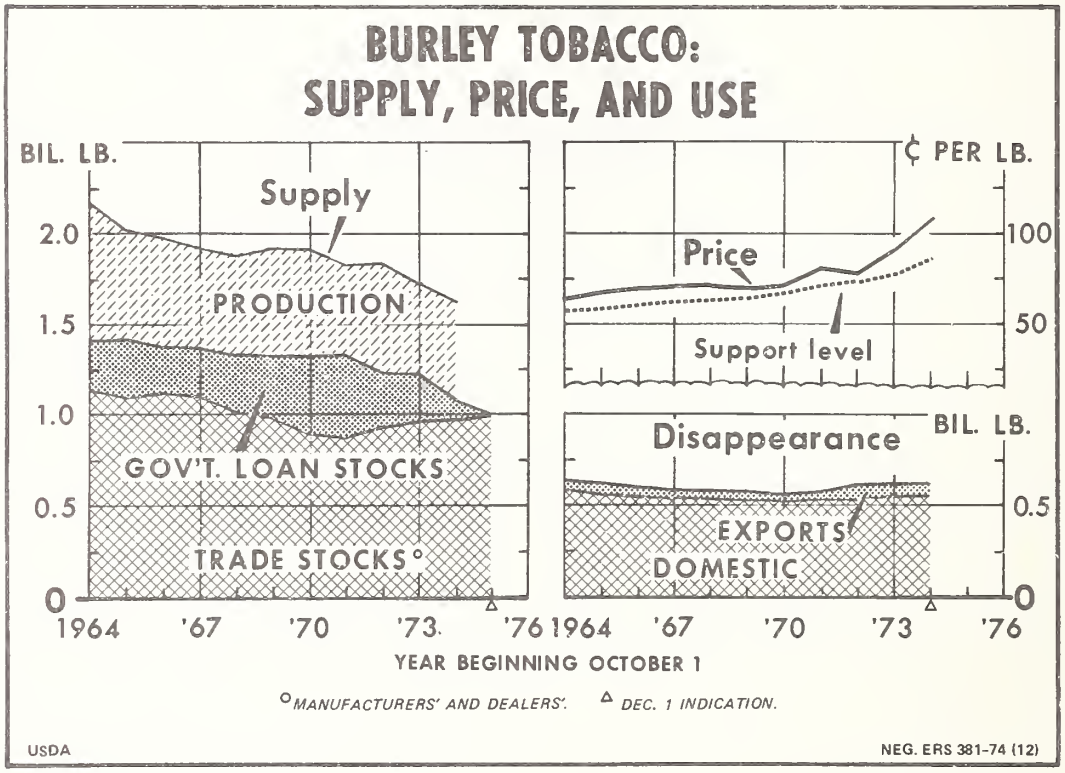
[2] Available from FAS Publications, Room 5918, USDA, Washington, D.C. 20250.

"Factors Affecting Cigarete Consumption," by Robert H. Miller, talk presented at the National Tobacco Tax Association Annual Meeting, Kiamesha Lake, New York, September 10, 1974.[1] Consumption of cigarettes continues to show further gains. A 1972 survey found that cigarette consumption is more frequently associated with the reported use of alcoholic beverages, marijuana or prescription drugs than it is with any one of the social or demographic characteristics such as sex, age, race or religion. However, more young people smoke, more males than females and a higher percentage of non-whites. Long term habits have been modified by the health scare, rising taxes, and legislation, however, per capita consumption continues to edge toward the peak level achieved in 1963.

"Outlook for Tobacco," by Robert H. Miller, talk presented at the National Agricultural Outlook Conference, USDA, Washington, D.C., December 12, 1974.[1] Discusses tobacco products, U.S. exports and imports, tobacco leaf.




FLUE-CURED TOBACCO:
SUPPLY, PRICE, AND USE
BIL. LB.
Supply
PRODUCTION
GOV'T. LOAN STOCKS
TRADE STOCKS°
3
2
1
0
1964
'67
'70
'73
'76
¢ PER LB.
Price
Support level
100
75
50
Disappearance
BIL. LB.
EXPORTS
DOMESTIC
1
0
YEAR BEGINNING JULY 1
°MANUFACTURERS' AND DEALERS'.
△ DEC. 1 INDICATION
USDA
NEG. ERS 223-74 (12)


BURLEY TOBACCO:
SUPPLY, PRICE, AND USE
BIL. LB.
Supply
PRODUCTION
GOV'T. LOAN STOCKS
TRADE STOCKS°
2.0
1.5
1.0
0.5
0
1964
'67
'70
'73
'76
¢ PER LB.
Price
Support level
100
50
Disappearance
BIL. LB.
EXPORTS
DOMESTIC
0.5
0
YEAR BEGINNING OCTOBER 1
°MANUFACTURERS' AND DEALERS'.
△ DEC. 1 INDICATION.
USDA
NEG. ERS 381-74 (12)

STATISTICAL SUMMARY

Item	Unit or base period	1973 Oct.	1973 Nov.	1974 Sept.	1974 Oct.	1974 Nov.	Last data as percentage of a year earlier
Average price at auctions							
Flue-cured	Ct. per lb.	89.3	86.1	109.2	115.5	103.6	120
Burley	Ct. per lb.	Closed	88.0	Closed		110.2	125
Maryland	Ct. per lb.	C-l-o-s-e-d		C-l-o-s-e-d			---
Virginia fire-cured	Ct. per lb.	C-l-o-s-e-d		C-l-o-s-e-d			---
Ky.-Tenn. fire-cured	Ct. per lb.	C-l-o-s-e-d		C-l-o-s-e-d			---
Ky.-Tenn. dark air-cured	Ct. per lb.	C-l-o-s-e-d		C-l-o-s-e-d			---
Virginia sun-cured	Ct. per lb.	C-l-o-s-e-d		C-l-o-s-e-d			---
Support price 1/							
Flue-cured	Ct. per lb.	76.6		83.3			109
Burley	Ct. per lb.	78.9		85.8			109
Maryland	Ct. per lb.	No support		No support			---
Virginia fire-cured	Ct. per lb.	53.5		58.2			109
Ky.-Tenn. fire-cured	Ct. per lb.	53.5		58.2			109
Ky.-Tenn. dark air-cured	Ct. per lb.	47.6		51.8			109
Virginia sun-cured	Ct. per lb.	47.6		51.8			109
Connecticut Valley cigar binder	Ct. per lb.	54.6		59.4			109
Wis. binder and Ohio filler	Ct. per lb.	39.5		42.9			109
Puerto Rican filler	Ct. per lb.	41.0		44.6			109
Parity index 2/	1910-14=100	515	519	599	603	610	118
Industrial production index 3/	1967=100	127.0	127.2	125.6	124.9	122.0	96
Employment	Mil.	86.0	85.8	86.5	86.5	85.7	100
Personal income 4/	Bil. dol.	1,090.8	1,100.0	1,178.0	1,185.0	1,182.8	108
		1973 Sept.	1973 Oct.	1974 Aug.	1974 Sept.	1974 Oct.	
Taxable removals							
Cigarettes	Bil.	46.1	58.5	50.9	48.1	55.6	95
Cigars and cigarillos	Mil.	556.1	692.1	561.2	569.6	656.5	95
Accumulated from Jan. 1							
Cigarettes	Bil.	437.1	495.7	389.9	438.0	493.6	100
Cigars and cigarillos	Mil.	5,107.1	5,799.3	4,127.3	4,696.9	5,353.4	92
Invoiced to domestic customers		Jan.-Sept.		Jan.-Sept.			
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	38.4		36.3			95
Chewing tobacco	Mil. lb.	56.0		59.2			105
Snuff	Mil. lb.	19.2		18.5			96
Tax-exempt removals							
Cigarettes	Bil.	4.9	5.0	5.4	4.5	4.3	86
Exports	Bil.	3.5	3.8	4.5	3.7	4.2	111
Cigars and cigarillos	Mil.	12.6	12.9	11.9	16.8	13.0	101
Accumulated from Jan. 1							
Cigarettes	Bil.	41.5	46.5	40.8	45.3	50.6	109
Exports	Bil.	30.6	34.4	31.5	35.2	39.5	115
Cigars and cigarillos	Mil.	110.3	123.2	90.1	107.0	119.9	97
Invoiced for export							
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	1.2		0.8			67
Chewing tobacco	Mil. lb.	.1		.1			100
Wholesale price indexes 5/							
Cigarettes (reg. nonfilter)	1967=100	126.3	126.3	140.2	140.2	140.2	111
Cigars	1967=100	112.2	112.2	118.4	119.3	119.3	106
Smoking tobacco	1967=100	124.0	124.0	135.9	135.9	135.9	110
Plug chewing tobacco	1967=100	128.8	128.8	136.2	136.2	136.2	106
Snuff	1967=100	149.6	157.9	157.1	157.1	161.9	103
Consumer price indexes (urban) 6/							
Cigarettes (reg. nonfilter)	1967=100	139.7	139.9	148.0	148.5	149.2	107
Cigarettes (filter tip king)	1967=100	140.2	140.4	148.4	148.6	149.6	107
Cigars (domestic reg. size)	1967=100	113.2	113.6	120.8	121.3	121.5	107
Imports of tobacco							
Cigarette leaf	Mil. lb.	13.8	17.3	12.4	15.7	19.5	112
Cigar tobacco 7/	Mil. lb.	11.9	12.2	8.6	19.4	11.4	93
Accumulated from Jan. 1							
Cigarette leaf	Mil. lb.	125.3	142.8	120.4	139.4	158.9	111
Cigar tobacco 7/	Mil. lb.	97.9	110.1	140.5	159.9	171.3	156

See footnotes at end of table.

Continued -

Item	Unit or base period	1973 Sept.	1973 Oct.	1974 Aug.	1974 Sept.	1974 Oct.	Last data as percentage of a year earlier
Exports of leaf tobacco (farm-sales weight)							
Flue-cured	Mil. lb.	51.3	58.3	40.7	31.5	61.5	90
Burley	Mil. lb.	6.7	5.3	4.2	4.9	3.7	70
Maryland	Mil. lb.	2.1	1.4	1.4	1.7	1.6	114
Virginia fire- & sun-cured	Mil. lb.	.3	.4	.4	.5	.2	50
Ky.-Tenn. fire-cured	Mil. lb.	2.2	1.5	1.5	2.5	1.0	67
Ky.-Tenn. dark air-cured	Mil. lb.	0	0	0	.3	.4	---
Black Fat	Mil. lb.	.3	*	.5	*	*	---
Cigar wrapper	Mil. lb.	.1	.2	.2	.1	.4	200
Connecticut binder	Mil. lb.	*	*	*	*	*	---
Wisconsin binder	Mil. lb.	0	0	0	0	0	---
Accumulated from beginning of marketing year 8/							
Flue-cured	Mil. lb.	120.0	188.3	74.4	105.9	167.4	89
Burley	Mil. lb.	75.6		79.9	86.8		115
Maryland	Mil. lb.	12.1		10.6	12.3		102
Virginia fire- & sun-cured	Mil. lb.	4.3		6.9	7.4		172
Ky.-Tenn. fire-cured	Mil. lb.	20.7		20.9	23.4		113
Ky.-Tenn. dark air-cured	Mil. lb.	.7		.8	1.0		143
Black Fat	Mil. lb.	3.1		2.6	2.6		84
Cigar wrapper	Mil. lb.	.4	.6	.3	.4	.7	117
Connecticut binder	Mil. lb.	.1		.1	.1		100
Wisconsin binder	Mil. lb.	*		*	*		---
Cigar filler	Mil. lb.	.3		.6	.7		233
Exports of manufactured tobacco in bulk	Mil. lb.	2.3	2.4	4.3	3.3	3.1	129
Accumulated from Jan. 1	Mil. lb.	18.2	20.6	24.9	28.2	31.3	152
		Quarterly data					
		1973 July-Sept.	1973 Oct.-Dec.	1974 July-Sept.		1974 Oct.-Dec.	
Stocks of tobacco--1st of quarter 9/							
Domestic types (farm-sales weight)							
Flue-cured	Mil. lb.	1,749	2,112	1,607		2,156	102
Burley	Mil. lb.	1,384	1,229	1,217		1,071	87
Maryland	Mil. lb.	60	53	68		62	117
Fire-cured	Mil. lb.	74	65	64		52	80
Dark air- and sun-cured	Mil. lb.	52	48	46		40	83
Cigar filler	Mil. lb.	76	70	67		63	90
Cigar binder	Mil. lb.	52	46	50		43	93
Cigar wrapper	Mil. lb.	18	18	15		16	89
Under Government loan 10/	Mil. lb.	708	643	433		428	67
Tobacco sheet 11/							
Cigarette types	Mil. lb.	23.5	23.5	23.0		24.0	102
Cigar types	Mil. lb.	1.9	1.5	1.6		1.1	73
Foreign types (farm-sales weight)							
Cigarette and smoking	Mil. lb.	455	434	497		493	114
Cigar	Mil. lb.	114	115	124		126	110
Tobacco outlets 12/							
Seasonally adjusted data, annual rates, for charts, p.2							
Cigarettes							
Production	Bil.	622.8	684.0	608.0		692.0	101
Taxable removals	Bil.	567.6	637.2	553.6		624.0	98
Large cigar production	Bil.	6.62	7.17	6.81		6.80	95
Smoking production	Mil. lb.	58.4	51.1	49.3		48.8	95
Chewing production							
Loose leaf	Mil. lb.	47.2	46.5	55.6		56.0	120
Plug and other	Mil. lb.	27.8	25.2	26.5		26.7	106
Snuff production	Mil. lb.	24.8	25.3	25.3		25.6	101
Exports of leaf							
Total	Mil. lb.	578.2	705.3	542.9		705.0	100
Flue-cured	Mil. lb.	460.9	593.9	406.6		594.0	100

1/1973 and 1974 crops respectively. 2/Prices paid by farmers including interest, taxes and wage rates. 3/Seasonally adjusted. 4/Seasonally adjusted, annual rate. 5/Excise tax excluded. 6/Federal and applicable state and local taxes included. 7/Farm-sales weight equivalent. 8/July 1 for flue-cured and cigar wrapper and October 1 for others. 9/Holdings of manufacturers and dealers including grower cooperatives. 10/Reported by grower cooperatives. 11/Weight of tobacco leaf not including stems added. 12/Data for most recent quarter are preliminary estimates. * Less than 50,000 pounds. Detail may not add to total due to rounding.

LIST OF TABLES

Title

Table		Page
1	Cigarettes: Output, removals, and consumption, 1962-74	5
2	Cigars and smoking tobacco: Output, removals, and consumption, 1964-74	5
3	Unmanufactured tobacco exports by types and countries, 1966-74	8
4	Unmanufactured tobacco exports, by types to principal destinations, marketing years, 1971/72-1973/74	9
5	U.S. imports of unmanufactured tobacco, for consumption, and general, 1973-74	10
6	Flue-cured and burley tobacco: Marketing quota and marketings, 1965-75	12
7	Flue-cured tobacco: Gross sales (including resales) average price, and Government loan receipts by Belt, 1967-74	13
8	Flue-cured and burley tobacco: U.S. supplies, disappearance, prices, 1964-74	15
9	Maryland tobacco: U.S. supplies, disappearance, prices, 1967-74	17
10	Fire-cured tobacco: U.S. supplies, disappearance, prices, 1967-74	19
11	Dark air-cured tobacco: U.S. supplies, disappearance, prices, 1967-74	20
12	Cigar tobacco: U.S. supplies, disappearance, and prices, 1967-74	22
13	Tobacco: Acreage, yield, production, supply, disappearance, and crop value, United States and Puerto Rico, 1947-74	24
14	Tobacco: Production in principal foreign countries, 1965-69, 1973-74	25
15	United Kingdom tobacco: Imports, stocks, clearances, exports, 1972-74	26
	Statistical Summary	29

UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C. 20250

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, $300

POSTAGE AND FEES PAID
U.S. DEPARTMENT OF
AGRICULTURE
AGR 101
FIRST CLASS

U.S.MAIL

NOTICE: If you don't want future issues of this ERS publication, check here ☐ and mail this sheet to the address below.

If your address should be changed, write your new address on this sheet and mail it to:

Automated Mailing List Section
Office of Plant and Operations
U.S. Department of Agriculture
Washington, D.C. 20250

TS-150 DECEMBER 1974